

Alma February 2015 Release:
**Celebrating Charles
Dickens' birthday**

7th February



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About the Alma Release Notes

Alma release notes provide you with information regarding what you need to get up and running with the new features and enhancements in the latest Alma release.

These release notes include:

- [Alma February 2015 Release Highlights](#)
- [Data Services](#)
- [Alma Show Me How and Videos](#)
- [Particular Issues to Note](#)
- Feature/enhancement descriptions for the respective Alma functional areas
 - [Acquisitions](#)
 - [Resource Management](#)
 - [Fulfillment](#)
 - [Resource Sharing](#)
 - [Administration](#)
 - [Analytics](#)
 - [Alma APIs](#)
 - [Collaborative Networks and Multicampus Institutions](#)
 - [Alma Interface Updates](#)
- [Known Issues](#)

Alma February 2015 Release Highlights

Acquisitions

- Trials Now Available for Databases

Until now, trials were available only for package types of electronic collections. Trials can now be performed for electronic collections of the type database as well.

Resource Management

- Alma Community Zone Opened for Editing

The Alma Community Zone is now open for contribution, allowing the community to edit bibliographic records. This first development is part of an overall plan to enhance and open the Community Zone to wider contribution by the community. The capability released this month enables shared management of bibliographic records by the community, according to the Community Cataloging Standard as outlined in the Community Zone Cataloging Guideline document. Contribution of updates to bibliographic records will provide the community with the ability to improve the quality of these records.

- Merge Two IZ Bibliographic Records in the MD Editor

It is now possible to merge two bibliographic records (not linked to the CZ) in the MD Editor. This is especially helpful when catalogers identify duplicate bibliographic records in the database that they want to combine into one bibliographic record.

- Automatic Handling of Multiple Matches During Import

The Alma import profile options have been updated to include an additional option to disregard matches that are based on invalid identifiers. Automatically disregarding matches based on invalid identifiers will reduce the number of multiple matches that occur today and will thus reduce the amount of manual handling required by the operators to resolve these multiple matches.

- SRU/SRW Integration

This enhancement allows for configuring which Alma institutions permit SRU (Search/Retrieve via URL) requests. To activate this capability, each institution must define and activate its own SRU target integration profile and also indicate whether to return availability information in the response to SRU queries.

Fulfillment

- **New Options Added to Hold Shelf Sorting**

Additional options have been added for selecting the criteria by which hold shelf items are sorted at a circulation desk. In addition to the existing options, you can now select to sort hold shelf items by call number or requester ID.

- **Additional Reading List Citation Attributes**

Alma comes out-of-the-box with certain defined citation attribute types and citation attributes configurations. You can now add additional attribute types and attributes, and map them to each other, as needed. Up to five citation attributes can be added per citation attribute type.

Resource Sharing

- **Configuring Additional Locate Attributes**

This feature enables controlling the fields that will be used by Alma for the locate process – for the Lending and Borrowing side locate, as well as for Self Ownership.

- **Lending Request: Locate Multiple Results**

When performing a manual Locate action for a lending request, multiple located results are displayed, enabling you to select a resource. In addition, the search term that was used by Alma for the locate action is displayed, allowing the operator to change the search term and re-attempt the locate action.

Administration

- **Status Pop-Up Added to Monitor Jobs**

A new pop-up window, providing details of a job's status as well as a link to a detailed report, is now available upon clicking the icon in the Status column of the Monitor Jobs page.

Alma RESTful APIs

- The following enhancements were made to the User RESTful APIs:
 - Support for multiple resource sharing libraries was added.
 - The ability to manage user roles was added.
 - The system control number non-serial match method has been added to the Create Order API

Collaborative Networks and Multicampus Institutions

- Merge Two NZ Bibliographic Records in the MD Editor
It is now possible to merge NZ two bibliographic records (not linked to the CZ) in the MD Editor.
- Network Zone: Inherited Policies and Terms of Use
This great new feature allows for policies and TOUs to be configured in the Network Zone, and to be distributed to the network's member institutions. When running the Distribute Network Fulfillment Changes to Members job, changes made at the network level take effect on the distributed policies and TOUs in the member institutions.
- Collaborative Networks – Central Management of User Accounts
With this great new feature, centrally managed collaborative networks may easily create a single user account that will have access to all of the institutions of the network. For example, an administrator user account may be created only once in the Network Zone, and be automatically duplicated in all of the network member institutions. Where SAML-based SSO is used, the same user account can then easily be used to access all of the institutions' menus without having to log in again at each institution.

Data Services

The Alma January Central KnowledgeBase and Community Zone package has been applied to the Alma environments.

New Electronic Collections Added to the Alma CKB

The following collections were added to the Alma CZ during the period 4-January-2015 through 25-January-2015:

- Cambridge University Press: JISC Collections: Full Collection Digital Archives (STM and HSS)
- EBSCOhost eBook Community College Collection
- Institute of Physics AAS Titles
- Institute of Physics Corporate
- Institute of Physics Historic Archive Purchase
- Institute of Physics Open Access Journal Titles
- Institute of Physics Package B
- Institute of Physics Package Z
- Institute of Physics Turpion Historic Archive Purchase
- JISC Collections: Taylor & Francis: Geography, Planning, Urban and Environment Online Archive
- Karger Books 2014
- Karger Books 2015
- Karger Books 2015
- Maney Open Access & Freely Available journals
- Oxford University Press: JISC Collections:Archive and Archive Upgrade
- Oxford University Press: JISC Collections:Archive and Archive Upgrade (2014-2017)
- Project Muse eBooks 2015
- Royal Society of Chemistry: JISC Collections:Journals Archive 1841-2004
- Royal Society of Chemistry: JISC Collections:Journals Archive 1841-2007
- Springer Link Books Humanities Social Sciences and Law Archive
- University Publishing Online Complete

- Wiley Online Library 2015 Full Collection
- Wiley Online Library: Medicine and Nursing 2015
- Wiley Online Library: SSH 2015
- Wiley Online Library: STM 2015

New External Resources That Are Open for Searching

The following external resource was added for this release:

- Lirias (fee required)

Alma Show Me How and Videos

The following sections describe Alma Show Me How and videos for the February 2015 release of Alma.

Alma Show Me How – February

Description

Alma Show Me How provides a menu-driven interface to prompt you through the steps of new or common tasks, or to point out new options, such as a check box, and direct you to the documentation that describes the new options in further detail.

Technical Instructions

Each Show Me How scenario may address different areas of Alma. The authorizations required to access the Show Me How scenarios are specific to the functional areas of the scenario.

To access Show Me How:

- 1 From the Alma home page, click the **Show Me How** button.
The How Can We Assist You? pop-up window displays.
- 2 Select one of the processes in order to start the prompted step-by-step instructions.

For the February release, the following Show Me How scenarios are available:

- Merge Two Bib Records in MD Editor
- Configure Citation Attribute Types
- Configure Citation Attributes
- Map Citation Attributes and Types

The following pop-ups are also available:

- **New: Start a Trial for Database** (Acquisitions > Purchase Order Lines Review, make sure there is a PO line with **Start a trial** action)
- **New: Link from Trial to Electronic Collection** (enter a Trial as a participant - link provided in email sent to participant)
- **New: Locate Multiple Results** (Fulfillment > Resource Sharing > Lending Requests, make sure there is a request with **Locate** action).

- **New: Edit Community Zone Records** (Persistent search for a title, then click **Community** tab, make sure there is an **Edit** action for the title).
- **New: Add Citation Attribute Within Reading List** (Fulfillment > Courses > Reading Lists, then open any reading list and under any citation, click **Edit**)
- **New: Opening Hours in Alma Menu** (click Alma menu, there should be a balloon pointing to Opening Hours)
- **New: Sort In Hold Shelf** (Fulfillment > Expired Hold Shelf or Active Hold Shelf – pop-up should display in both)

Alma Videos – February

The following new videos are available from the Show Me How menu, and when you select **Help > What's New Videos** in Alma:

- New Options Added to Hold Shelf Sorting
- Additional Reading List Citation Attributes
- Edit a Community Zone Record
- Trial for Electronic Collection of Type Database
- Lending Request: Locate Multiple Results
- Resolve Multiple Match with Invalid/Canceled Identifier
- Network Zone: Inherited Policies and Terms of Use
- Merge Two Bibliographic Records in the MD Editor

Particular Issues to Note

The following issues should be noted:

- Lost loan notifications are now sent per profile. This means that if there is more than one notification profile whose criteria matches a loan, instead of sending only one notification message, one notification is sent for each matching profile.

For example:

- Profile A sends a notification message when an item is 3 days overdue.
- Profile B sends a notification message when an item is 5 days overdue.

If the **Loans – Change to Lost** job runs every day, a notification message is sent after 3 days and again after 5 days (once for each matching profile).

Note: This enhancement enables setting up a schedule for resending overdue notices for overdue loans. If you have previously set up overlapping profiles (such as in the above example) and do not want to resend notices, you must modify the overdue profiles accordingly.

- The following electronic collection type values will be removed from Alma as of the March 2015 release:
 - A&I database (to be deprecated)
 - Full text database (to be deprecated)
 - Partial full text database (to be deprecated)
 - Other (to be deprecated)

Note that electronic collections that were previously defined with these values will remain as is in the system. You are not required to take any action regarding these electronic collections.

Acquisitions

The following sections describe the features provided for the Acquisitions functional area in the February 2015 release of Alma.

Trials Now Available for Databases

Description

Until now, trials were available only for PO lines of electronic collections that had portfolios and services (formerly called packages).

With the February release, trials can also be performed for PO lines of electronic collections that have URLs and MMS IDs (formerly called databases), instead of portfolios/services.

Technical Instructions

The following roles can access this feature:

- Trial Operator
- Trial Manager

To manage trials for electronic PO lines of the purchase type Database:

Run a trial for a PO line with purchase type **Database** (click **Save and Start Trial** when creating the PO line).

The survey form contains the new **Electronic Collection** tab that contains the URL of the electronic collection.



Figure 1 – Electronic Collection Tab

In addition, the trial notification to participants in the survey includes the URL to access the electronic collection:

Trial

Implementor Ex Libris

516 High St
Evergreen Pkwy
Bellingham 98225
WA

Dear Mr./Ms. Implementor

Thank you for agreeing to participate in the trial we are conducting for : Safari .

link to trial form : [Safari](#)

link to Electronic Collection : [Safari](#)

The trial is scheduled to run from 01/08/2015 - 01/29/2015 .

Sincerely

Acquisitions Department

Figure 2 – URL to Access the Electronic Collection

Other Acquisitions Enhancements

- Several enhancements have been implemented to the Accrual Accounting feature:
 - The sort of the fiscal period (in the **Fiscal Period** column on the Add Invoice Line page) is now according to ID and not description.
 - The list of funds is now numbered consecutively.
 - Some of the accrual mode error messages were too general and have now been made more specific.

Resource Management

The following sections describe the functions provided for the Resource Management functional area in the February 2015 release of Alma.

Alma Community Zone Opened for Editing

Description

With the February release, the Alma Community Zone is opened for contribution enabling the community to edit bibliographic records.

Opening the Community Zone for contribution enables shared management of bibliographic records by the community according to the community cataloging standard, as outlined in <http://www.exlibrisgroup.com/files/Products/Alma/AlmaCommunityCatalogCatalogingStandardsPolicies.pdf>.

Contribution of updates to bibliographic records provides the community with the ability to improve the quality of bibliographic records.

This is the first stage of opening the Community Zone for contribution. The ability to contribute portfolios and electronic collections will follow.

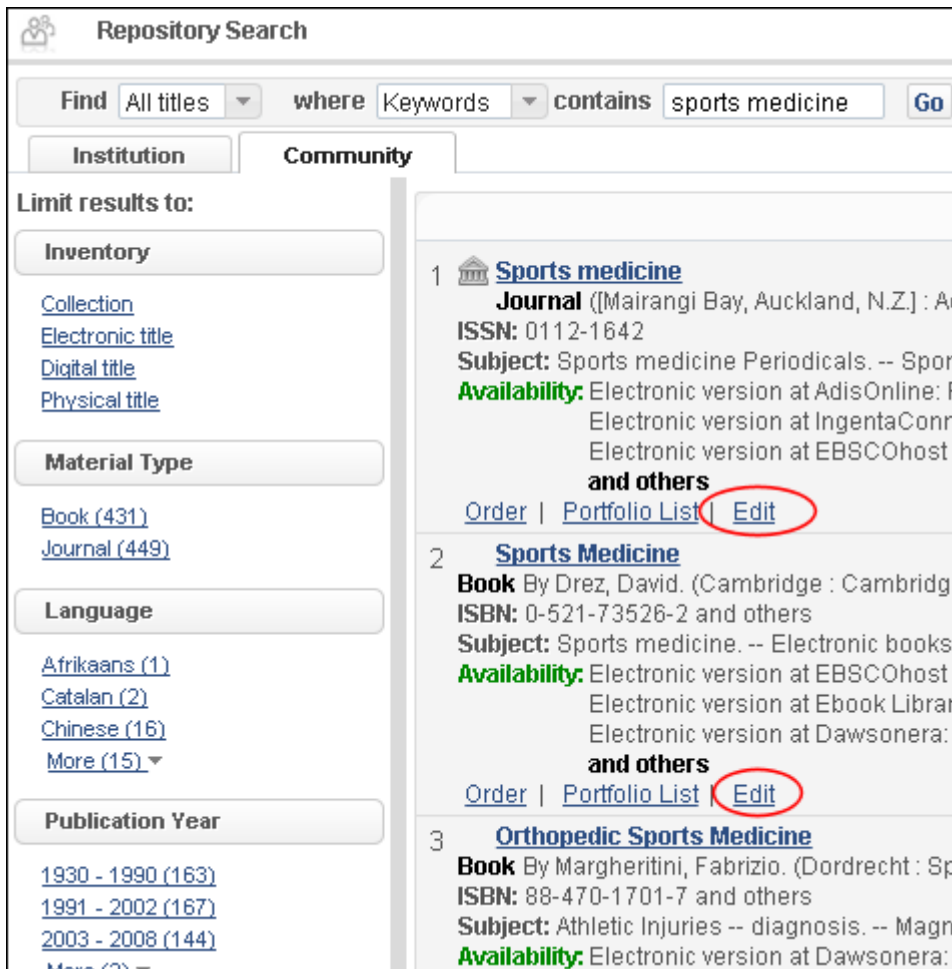
Technical Instructions

The following roles can edit CZ bibliographic records:

- Cataloger
- Catalog Manager
- Catalog Administrator

To edit CZ bibliographic records:

- 1 Using Alma's Repository Search, locate the CZ bibliographic record that you want to edit.



The screenshot displays the Alma Repository Search interface. At the top, there is a search bar with the text "Repository Search". Below it, a search query is entered: "Find All titles where Keywords contains sports medicine Go". The interface is divided into two main sections: "Institution" and "Community". The "Community" section is active, showing a list of search results. On the left side, there are filters for "Limit results to:" including "Inventory", "Collection", "Electronic title", "Digital title", "Physical title", "Material Type", "Language", and "Publication Year". The search results list three items:

- 1 **Sports medicine**
Journal ([Mairangi Bay, Auckland, N.Z.] : Ad
ISSN: 0112-1642
Subject: Sports medicine Periodicals. -- Sport
Availability: Electronic version at AdisOnline: F
Electronic version at IngentaConn
Electronic version at EBSCOhost S
and others
[Order](#) | [Portfolio List](#) | [Edit](#)
- 2 **Sports Medicine**
Book By Drez, David. (Cambridge : Cambridge
ISBN: 0-521-73526-2 and others
Subject: Sports medicine. -- Electronic books.
Availability: Electronic version at EBSCOhost E
Electronic version at Ebook Libran
Electronic version at Dawsonera: I
and others
[Order](#) | [Portfolio List](#) | [Edit](#)
- 3 **Orthopedic Sports Medicine**
Book By Margheritini, Fabrizio. (Dordrecht : Sp
ISBN: 88-470-1701-7 and others
Subject: Athletic Injuries -- diagnosis. -- Magn
Availability: Electronic version at Dawsonera: I

Figure 3 - CZ Bibliographic Record to Edit

- 2 Click the **Edit** link for the CZ bibliographic record that you want to edit. The CZ bibliographic record opens in the MD Editor.

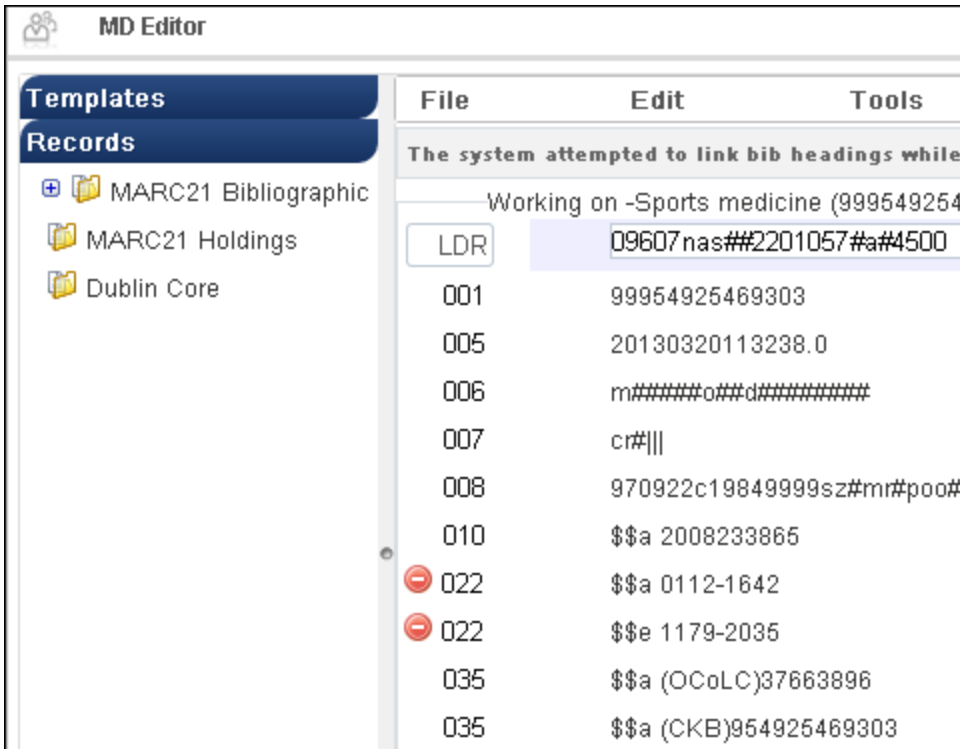


Figure 4 - CZ Bibliographic Record Opened in the MD Editor

To prevent multiple catalogers from editing the same CZ bibliographic record at the same time, the CZ bibliographic record is locked when it is first opened by a cataloger for editing. When the record is in a locked mode, the system displays the ID of the user who has the record locked. Refer to the examples below of CZ bibliographic records that are locked when a previous user has not yet released them.

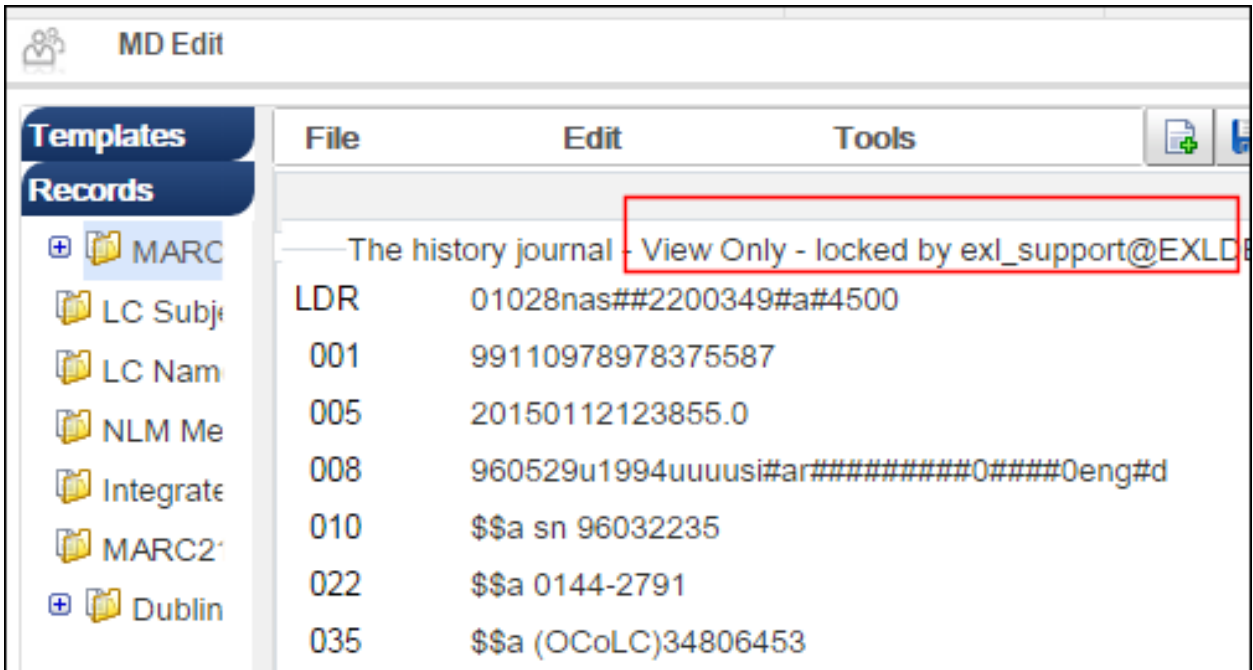


Figure 5 - CZ Bibliographic Record in Locked Mode (IZ Example)

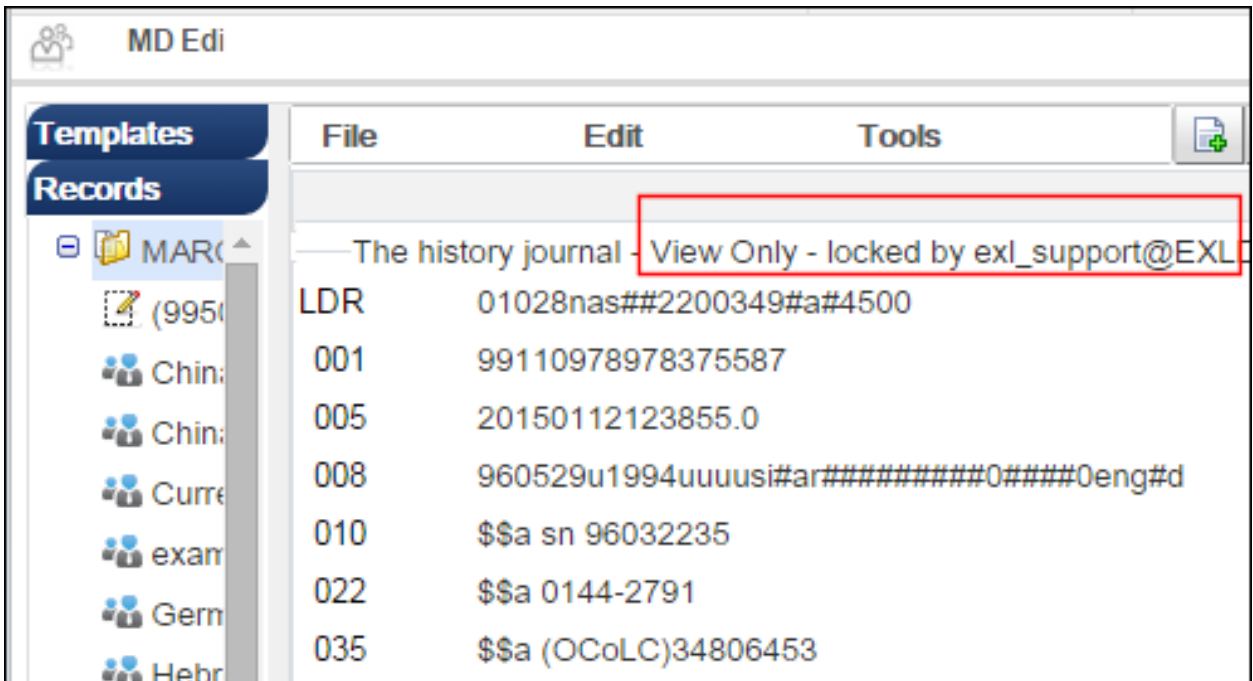


Figure 6 - CZ Bibliographic Record in Locked Mode (NZ Example)

- 3 To view all the CZ bibliographic records with which you have been working, click the **MARC21 Bibliographic** folder and click **Load Community Draft Records**.

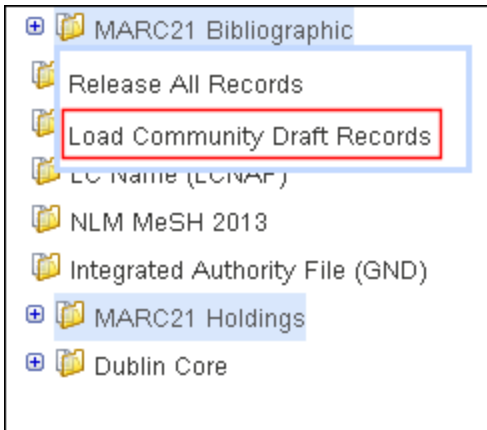


Figure 7 - Load Community Draft Records

The draft CZ bibliographic records on which you are working display with the CZ icon.

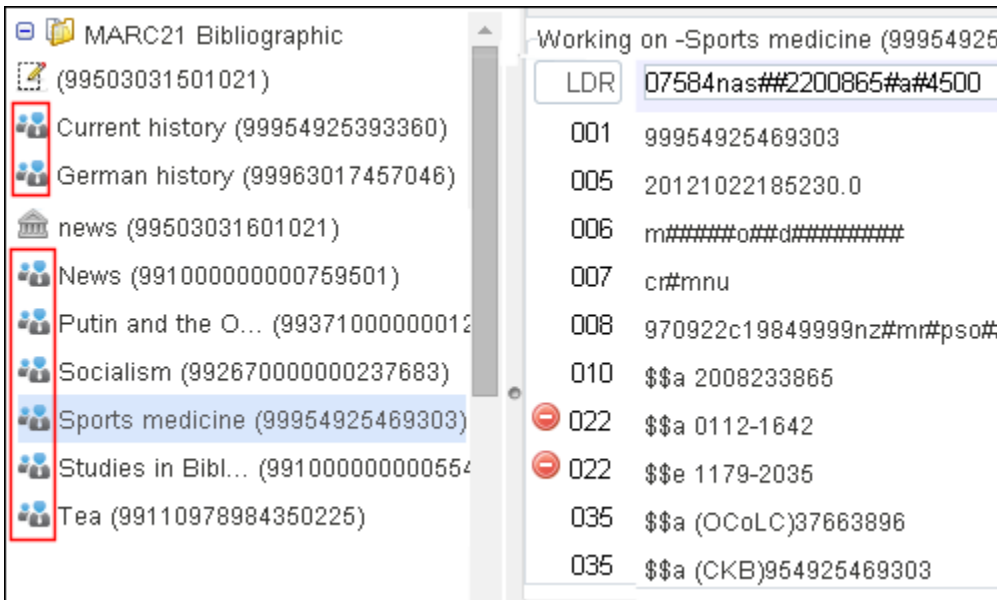



Figure 8 - CZ Bibliographic Record Icon (in the Left Pane of the MD Editor)

- Edit the CZ bibliographic record with the changes you need to make using the table below for additional information regarding options available in the MD Editor.

Field 022 may not be added, edited, or removed from the CZ bibliographic record that you are editing. The  icon in the 022 row is an indicator that the 022 field cannot be edited. Contribution to/editing the 022 field cannot currently be performed because this can affect the link resolution that is dependent on the 022 field. This restriction will be removed in a future release once the link resolution is changed to not be dependent solely on the 022 field.

MD Editor Options	Description
File:	
New	CZ bibliographic records can only be edited by a cataloger at the institution. New CZ bibliographic records cannot be added to the CZ.
Save Draft	Saves draft records in the MD Editor.
Save Record	Saves existing records in the CZ.
Save and Release Record	Saves records in the CZ and releases them in the MD Editor.
Duplicate	This option is inactive when editing CZ bibliographic records.
Release Record	Releases existing records consistent with existing MD Editor functionality.
Assign Record to Another Cataloger	Assigns the CZ bibliographic record to another institution cataloger for editing.

MD Editor Options	Description
Release Assignment	Releases the CZ bibliographic record for another cataloger to edit.
Save as Template	Saves the CZ bibliographic record you are editing as a local template.
Reload Original Record	Reloads the original CZ bibliographic record from the CZ.
Delete Record	This option is inactive when editing CZ bibliographic records.
Copy to Catalog	<p>Selecting this option saves a local copy of the CZ bibliographic record on which you are working separate/disconnected from the original CZ bibliographic record. When a local copy is created, the CZ record ID is saved in the originating system/originating system ID fields of the local record.</p> <hr/> <p>Note: If a local copy already exists in the IZ linked to the CZ, the link is removed.</p> <hr/>
Exit	Closes the MD Editor.
Edit:	
Add Field	Adds a field to the CZ bibliographic record.
Remove Field	Removes a field from the CZ bibliographic record.
Add Subfield	Adds a subfield to the CZ bibliographic record.
Add Alternate Graphic Representation	This option is inactive when editing CZ bibliographic records.
Add Rule	This option is inactive when editing CZ bibliographic records.
Enhance the Record	This option is inactive when editing CZ bibliographic records.
Expand from Template	This option is inactive when editing CZ bibliographic records.
Split Editor	This option is inactive when editing CZ bibliographic records.
Full Screen	Displays the MD Editor in full-screen mode.
Open Form Editor	Expands the display of a field to enable modifying individual components/positions of a multiposition field such as the leader (LDR) field.

MD Editor Options	Description
Close Form Editor	Closes the expanded display of a field.
Cut	Removes and copies a field in the CZ bibliographic record being edited.
Copy	Copies a field in the CZ bibliographic record being edited.
Paste	Pastes a previously copied field to the CZ bibliographic record being edited.
Tools:	
Search External Resources	This option is inactive when editing CZ bibliographic records. This option will be opened in a future release.
View Versions	Displays the version of the CZ bibliographic record being edited.
Validate	Performs a validity on the CZ bibliographic record being edited using the CZ MD Registry and validation routines.
Browse Call Numbers	This option is inactive when editing CZ bibliographic records.
View Notes	Enables you to view and add notes to the CZ bibliographic record begin edited.
Release All Records for User	Releases all records being worked on including the CZ bibliographic record being edited.

MD Editor Options	Description
MARC Bibliographic	<p>The following actions can be performed when editing CZ bibliographic records except where noted:</p> <ul style="list-style-type: none"> ▪ Derive New Record ▪ Merge Records and Combine Inventory – This option is inactive when editing CZ bibliographic records. ▪ Add Holdings – Holdings are added locally. When editing CZ bibliographic records, the system first checks for a local bibliographic record linked to the CZ bibliographic record being edited. If a local, linked bibliographic record does not exist, a copy of the original record is created as a local bibliographic record and assigned a local MMS ID and linked to the record in the CZ. The holdings is added to the local bibliographic record. ▪ Add Local Portfolio – Adds a local portfolio to a local, linked record (in the same manner as described above for holdings). ▪ Create PO Line and Exit – Adds a local PO line to a local, linked record (in the same manner as described above for holdings) and exits the MD Editor. ▪ Find Matches – Looks for matches in the CZ. ▪ View Inventory – Displays local inventory ▪ View in Search – Opens the Repository Search page. The Community tab will need to be selected for viewing CZ bibliographic records. ▪ View Orders (no orders) – This option is inactive when editing CZ bibliographic records. ▪ Related Records – Related records are not available.
MARC 21 Authorities	This option is inactive when editing CZ bibliographic records.
MARC 21 Holdings	This option is inactive when editing CZ bibliographic records.
Dublin Core	This option is inactive when editing CZ bibliographic records.

MD Editor Options	Description
Set Management Tags	<p>The following actions can be performed when editing CZ bibliographic records except where noted:</p> <ul style="list-style-type: none"> ▪ Suppress from Discovery ▪ Export to WorldCat (Don't Publish, Publish Holdings Only, Publish Bibliographic Record) ▪ Force Export to WorldCat ▪ Brief? – This option is inactive when editing CZ bibliographic records. <p>Set Management Tag settings apply locally. When a cataloger selects a management tag such as Suppress from Discovery, the new selection value is applied to the local copy of the bibliographic record. Publishing processes use the values of the local management tags.</p>

5 After completing the changes, save the record.

Any change to Community Zone bibliographic records is automatically reflected in every institution that uses the Community Zone bibliographic record.

When an edited CZ bibliographic record is saved, it is validated using the Community Zone MD Registry and validation routines. It is also normalized using the CZ normalization routines.

Merge Two Bibliographic Records in the MD Editor

Description

With the February release, Alma provides the ability to merge two bibliographic records (not linked to the CZ) in the MD Editor. This is especially helpful when catalogers identify duplicate bibliographic records in the catalog that they want to combine into one bibliographic record. The merge is handled by selecting one of the merge rules from a list of predefined merge routines. Merging two bibliographic records into one will also move the following entities to the merged record:

- PO line
- Electronic collections
- Electronic portfolios
- Physical items
- Digital representations

- Loans
- Requests
- Reading lists

Technical Instructions

The following role can merge bibliographic records:

- Cataloger Extended

To merge two bibliographic records using the MD Editor:

- 1 Using Repository Search, locate the two bibliographic records that you want to merge.
- 2 Edit both records so that they both display under the **Records** tab in the MD Editor.

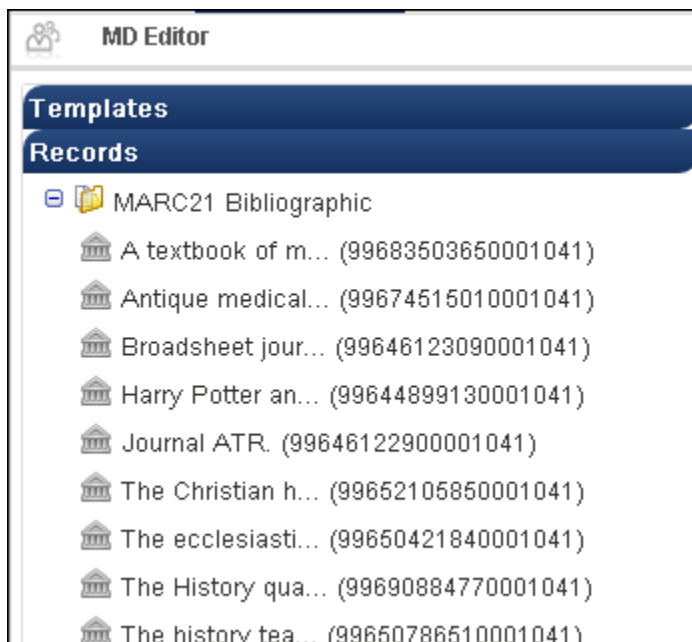


Figure 9 - Bibliographic Records under the Records Tab

- 3 From the list under the **Records** tab, click the preferred local bibliographic record first.
- 4 Click the **Split Editor** icon and click the non-preferred bibliographic record so that it displays on the right (refer to the example below).

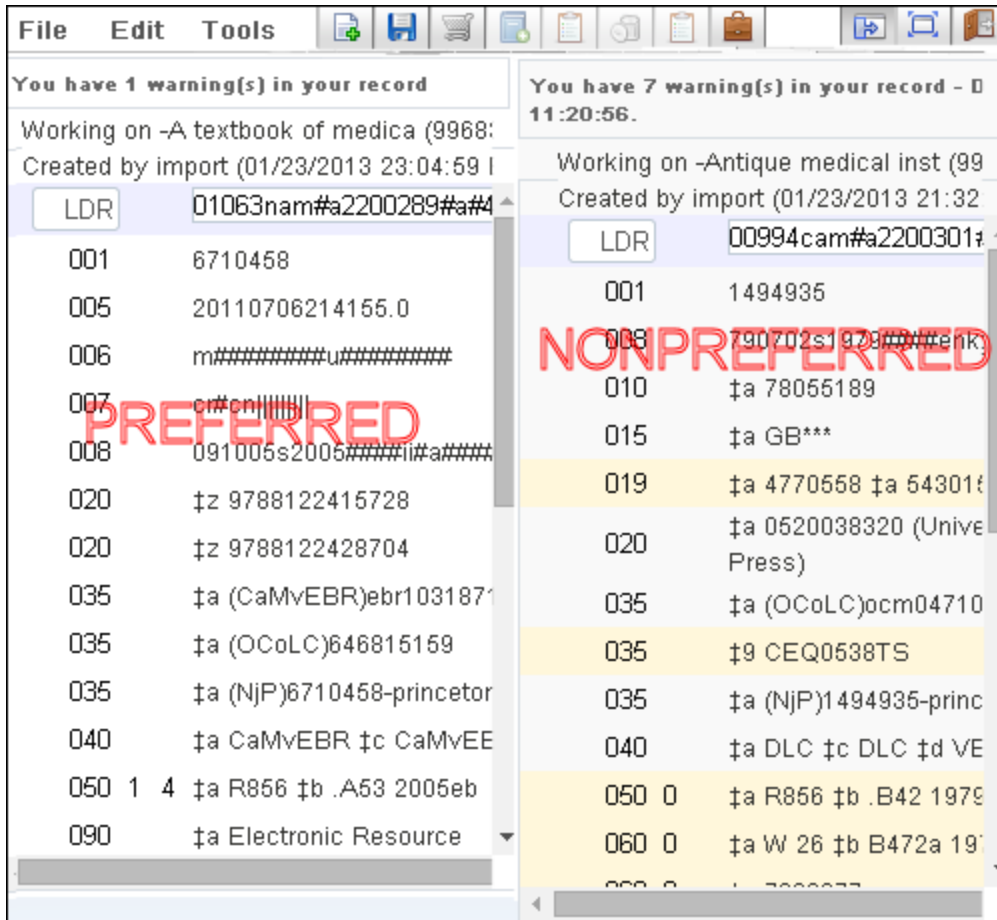


Figure 10 - Both Bibliographic Records Open (Preferred on the Left and Nonpreferred on the Right)

- To initiate the merge and combine inventory action, click **Merge Records & Combine Inventory** (Tools > MARC Bibliographic > Merge Records & Combine Inventory).

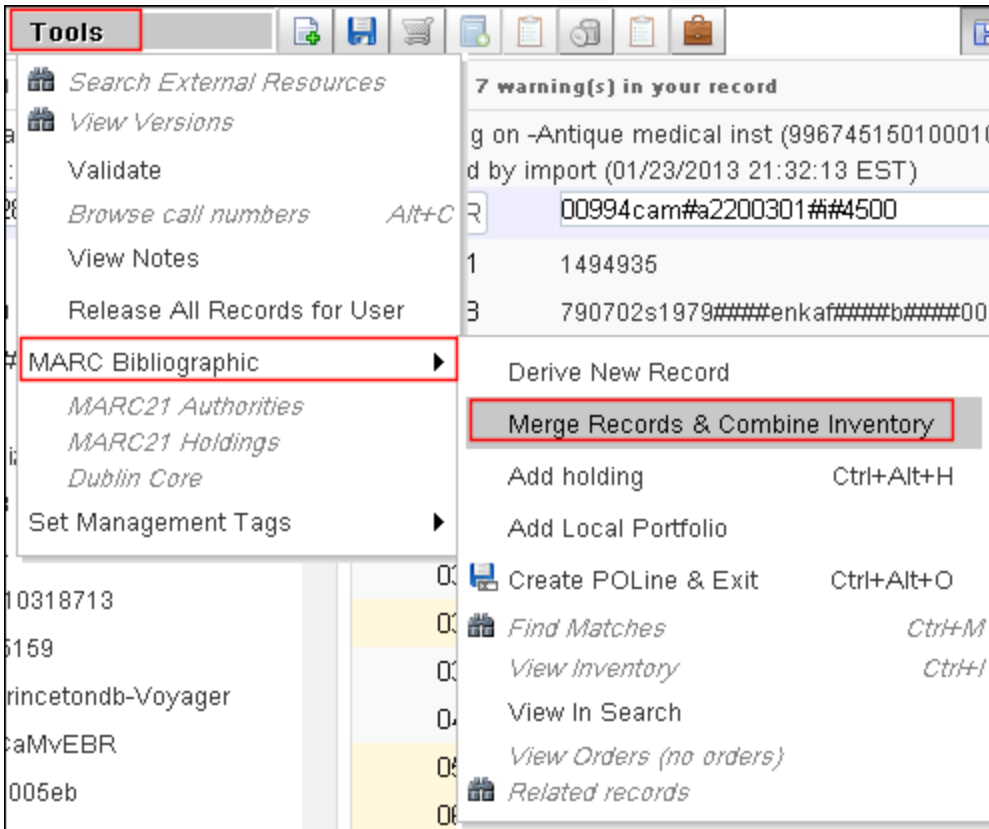


Figure 11 - Merge Local IZ Records and Combine Inventory

The Merge Records and Combine Inventory dialog box opens.

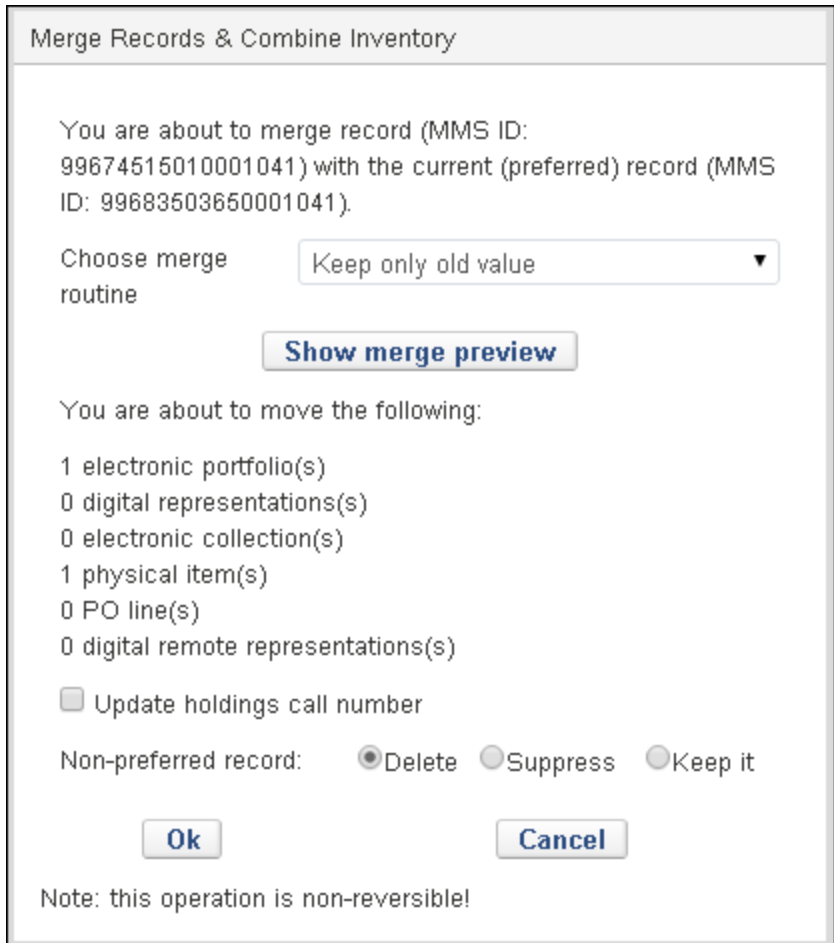


Figure 12 - Merge Records and Combine Inventory Dialog Box (IZ Environment)

- 6 Use the merge information/options provided.
 - a Review any messages displayed. In particular, be aware as indicated in the message that this operation is not reversible.

Under **You are about to move the following:**, the system lists the changes that will occur after the merge. In addition, holdings requests, loans, and reading lists attached to the non-preferred record will be updated.

- b Select a merge routine from the drop-down list. The merge routines that display in the list are pulled from the merge rules list under the **Rules** tab in the MD Editor.
 - c To preview the merge results, click **Show merge preview**.

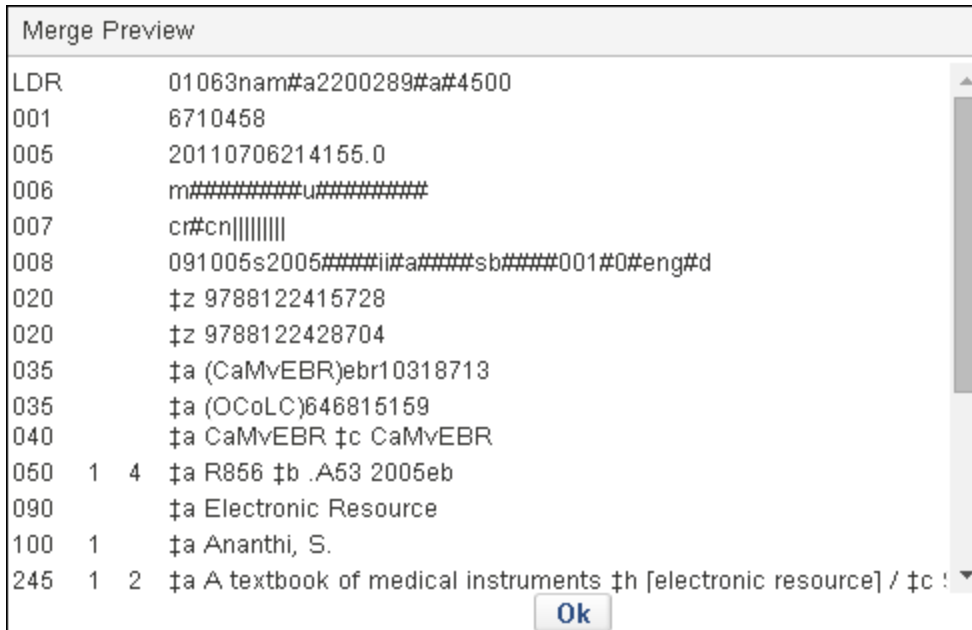


Figure 13 - Merge Preview

- d Click **OK** to close the **Merge Preview** view.
- e Optionally, select **Update holdings call number**. When you select this option, the system updates the call number information (using the bibliographic call number) for all the holdings associated with the preferred record. When you choose to have the call number information updated, this change is applied to the holdings associated with the preferred record after the bibliographic merge has been processed.
- f Select how you want to handle the non-preferred bibliographic record (after the merge) from the following options:
 - Delete
 - Suppress
 - Keep it

- g When you are ready to merge the two records, click **OK**.

If there is a constraint that prevents merging the two bibliographic records, such as if the preferred record is linked to the CZ or there is a fulfillment issue with the non-preferred record, the system will not merge the bibliographic records and provide warning messages.

Automatic Handling of Multiple Matches During Import

Description

As part of the Alma February release, the Alma import profile options have been updated to include an additional option to disregard matches that are based on invalid identifiers. Automatically disregarding matches based on invalid identifiers will reduce the amount of multiple matches that occur today and, as a result, reduce the amount of manual handling required by the operators to resolve the multiple matches. Previously, valid (035\$a) and canceled/invalid (035\$z) control numbers/identifiers resulted in multiple matches that impeded a smooth import of records.

With this new feature selected in your import profiles, Alma is able to ignore (filter out) the canceled/invalid identifiers in the 035\$z and more successfully run your import jobs that involve multiple matches.

Technical Instructions

The following role can configure import profiles for multiple matches:

- Catalog Administrator

To configure import profiles to disregard canceled/invalid control numbers (035\$z):

- 1 Open the Run Import page (**Resource Management > Resource Configuration > Configuration Menu > Record Import section > Import Profiles**).
- 2 Create a new import profile or edit (**Actions > Edit**) an existing import profile and locate the **Automatic Multi Matches Handling** section.

Match Profile

Serial match method Unique OCLC Identifier Match M

Non Serial match method Unique OCLC Identifier Match M

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Do Not Import Import New Record

Merge/Overlay

Merge method Overlay all fields but local

Allow bibliographic record deletion

Unlink bibliographic records from community zone

Do not override/merge a non-brief record with a brief version

Automatic Multi matches Handling

Disregard matches for bibliographic CZ linked records

Disregard invalid/canceled system control number identifiers

Unresolved Records

Skip and do not import

No Match

Upon no match Do Not Import Import

Figure 14 - Automatic Multi Matches Handling Section

- 3 Select the **Disregard invalid/canceled system control number identifiers** parameter.

Automatic Multi matches Handling

Disregard matches for bibliographic CZ linked records

Disregard invalid/canceled system control number identifiers

Unresolved Records

Skip and do not import

Figure 15 - Disregard Invalid/Canceled System Control Number Identifiers Parameter

Note: When you select **Disregard matches for bibliographic CZ linked records** in addition to **Disregard invalid/canceled system control number identifiers**, the system processes/handles multiple matches for the **Disregard matches for bibliographic CZ linked records** parameter first and, subsequently, processes any remaining multiple matches using the **Disregard invalid/canceled system control number identifiers** parameter. The parameters selected in the **Automatic Multi Matches Handling** section of the import profile are processed sequentially as displayed/selected in the profile.

- 4 Complete the remainder of the import profile as you normally would and confirm that you have selected one of the following match methods in the Match Profile section (that uses the 035 field):
 - Unique OCLC Identifier Match Method
 - 024 / 035 Match Method
 - Fuzzy Serial Match Method
 - ISSN / 024 / 035 Match Method
 - 035 (Other System Identifier) Match Method

The screenshot shows a 'Match Profile' section with two dropdown menus. The 'Serial match method' dropdown is set to 'Unique OCLC Identifier Match M' and the 'Non Serial match method' dropdown is also set to 'Unique OCLC Identifier Match M'.

Figure 16 - Match Profile Section (of the Import Profile)

Refer to <http://www.loc.gov/marc/bibliographic/concise/bd035.html> for more information regarding the 035\$a and 035\$z.

The job report that results from running this import profile has been updated to note the number of multiple matches resolved related to:

- Disregarding canceled/invalid control numbers
- Disregarding bibliographic CZ linked records

1	Matches found	0
2	Multi-matches found	6
3	Multi-matches resolved automatically	4
4	Multi-matches resolved automatically, Disregard CZ records	1
5	Multi-matches resolved automatically, Disregard invalid/canceled system control number	3
6	Multi-matches skipped	2

Figure 17 - Additional Import Job Report Counts for Multiple Matches

These new counts are a subset of **Multi-matches resolved automatically**, and their count totals should add up to equal the count total for **Multi-matches resolved automatically**.

SRU/SRW Integration

Description

This enhancement allows the opening of the Alma institution to SRU/SRW searches for the purpose of integration with external systems that want to search the Alma repository. To activate this capability, each institution must define and activate its own SRU Target integration profile and also indicate whether to return availability information in the response to SRU queries.

For details on performing SRU requests, refer to the following page on the Alma Developer's Network: <https://developers.exlibrisgroup.com/alma/integrations/SRU>.

Technical Instructions

The following role is required to define integration profiles:

- General System Administrator

To configure the SRU Target integration profile for your institution:

- 1 On the General Configuration page (**Administration > General Configuration > Configuration Menu**), click **Integration Profiles** under **External Systems**.

The Integration Profile List page opens.

- 2 Click the **Add Integration Profile** button.

Page 1 of the External System Wizard opens.

- 3 Fill in the following required fields and then click **Next**:

- **Code** – Enter a unique code for the new integration type.
- **Name** – Enter a unique name for the new integration type.
- **Integration Type** – Select **SRU Target**.

The screenshot shows the 'External System' wizard on page 1. At the top, there are navigation buttons: 'Cancel' and 'Next'. Below this is a table header with columns: 'Code -', 'Name -', and 'Integration Type -'. The main form area contains the following fields:

- Code ***: Text input field containing 'SRU'
- Name ***: Text input field containing 'SRU'
- Integration Type ***: Dropdown menu with 'SRU Target' selected
- Default**: Check box, currently unchecked
- Description**: Large text area, currently empty

At the bottom right of the form, there are 'Cancel' and 'Next' buttons.

Figure 18 – External System Wizard (Page 1)

- 4 On page 2 of the wizard, specify the following fields:
 - **Active** – Select this option to enable SRU capabilities for the institution.
 - **Add Availability** – Select this option if you want to include the availability information, which is stored in the AVA (physical availability) and AVE (electronic availability) fields of the record, in responses to SRU query requests.

The screenshot shows the 'External System' wizard on page 2. At the top, there are navigation buttons: 'Back', 'Cancel', and 'Save'. Below this is a table header with columns: 'Code SRU', 'Name SRU', and 'Integration Type SRU Target'. The main form area contains the following fields:

- Active**: Check box, checked
- Add Availability**: Check box, checked

At the bottom right of the form, there are 'Back', 'Cancel', and 'Save' buttons.

Figure 19 – External System Wizard (Page 2)

- 5 Click Save.

General Publishing at the Holdings/Portfolio Level

Description

This enhancement allows you to publish holding records as part of the publishing platform for the purpose of synchronizing holding information with external systems.

This type of publishing can be used to export holdings records separately, but it requires you to configure normalization rules to remove bibliographic information included with each exported record.

Technical Instructions

To add publishing profiles, you must have one of the following roles:

- Repository Administrator
- Catalog Administrator
- General System Administrator

To configure a general publishing profile to export at the holdings level:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Publishing Profiles** under **Record Export**.

The Publishing Profiles page opens.

- 2 Select **Add Profile > General Profile** to open the Publishing Profile Details page.

Publishing Profile Details 1 2 3 Cancel Next

Profile Id - Profile Name

Profile Name *

Profile Description

Status Active Inactive

Scheduling Email Notifications

Content

Set name *

Publish on: Bibliographic level Holdings/portfolio level Item/portfolio level

Publishing Protocol

Figure 20 – Publishing Profile Details (Page 1)

- 3 Specify the following required fields: **Profile name**, **Set name**, **FTP configuration**, and **Compressed file name prefix**.
- 4 For the **Publish on** field, select the **Holdings/portfolio level** option.

Note: When this option is selected, a bibliographic record is exported with each holdings/portfolio. If you want to publish only holdings records, you will need to add a normalization rule to remove the bibliographic-related fields.

- 5 Click **Next** to open the second page of the wizard.
- 6 Configure the mappings from the bibliographic record to the holdings record.

The **Quick Add** section under **Physical Inventory Enrichment** has been modified to allow the following mappings:

- Control fields (such as the LDR) can be mapped to the bibliographic LDR.
- All subfields of a holdings field can be mapped to the bibliographic field without creating a separate mapping for each subfield. In the following example, if the 852 field includes subfields a, b, c, h, and so forth, each subfield will be mapped to each subfield automatically in the 900 field.

Publishing Profile Details ① ② ③ Back Cancel Next

Profile Id - Profile Name

Bibliographic Normalization

Correct the data using normalization rules

Physical Inventory Enrichment

Add Holdings information

Quick Add

Holding Tag	Holding Subfield	Bib Tag	Bib Subfield
1	852	-	900

Add

1 Holding Tag Holding Subfield Bib Tag Bib Subfield

1 852 - 900 - Delete

Figure 21 – Publishing Profile Details (Page 2)

- 7 Click **Next** to configure the remaining pages of the wizard.

Additional Scheduling Options for General Profiles for Publishing

Description

With the February 2015 release of Alma, you now have several daily scheduling options from which to choose when configuring/adding General Profiles for publishing. Previously, you were limited to selecting weekly or monthly scheduling options. With these new options, you can schedule jobs to run automatically on a daily basis. As a result, the data in the target system will always be fully up-to-date and synchronized with the data in Alma.

Technical Instructions

The following roles can add/update the General Profile for publishing:

- Catalog Administrator
- Repository Administrator
- General System Administrator

To create a General Profile for publishing with the new scheduling options:

- 1 Open the **Publishing Profiles** page (**Resource Management > Resource Configuration > Configuration Menu > Record Export section > Publishing Profiles**).
- 2 Click **Add Profile** and select **General Profile**.
- 3 Open the **Scheduling** drop-down list to view your new options. Refer to the illustration below for the available options.

Publishing Profile Details

Profile Id -

Profile Name *

Profile Description

Status Active Inactive

Scheduling Not scheduled

Content

Set name *

Publish on:

Publishing Protocol

FTP configuration *

Files Configuration

Single File Configuration

MARC output format MARC21 Binary

Number of records in file 1000

Compressed File Configuration

Use default file name No Yes

Figure 22 - General Publishing Profile Daily Scheduling Options

- 4 Select one of the new daily scheduling options.
- 5 Complete the remainder of the publishing profile as you normally would.

Import Repository and Authority Data Using the OAI Protocol

Description

This enhancement allows you to configure an import profile that uses the OAI harvesting protocol to import repository and authority metadata from a provider. The Connect and Edit functionality allows you to test the OAI connection and harvest and select additional settings for the OAI provider.

Technical Instructions

The following role is required to define import profiles:

- Catalog Administrator

To configure an import profile to use the OAI protocol:

- 1 On the Resource Management Configuration page (**Resource Management > Resource Configuration > Configuration Menu**), click **Import Profiles** under **Record Import**.

The Run Import page opens.

- 2 Click **Add New Profile**.

The first page of the Import Profile Details wizard opens.

- 3 Select the Profile Type (**Repository** or **Authority**) and click **Next**.

The second page of the Import Profile Details wizard opens.

- 4 Specify the following fields to configure the OAI import:

- **Profile name** – Specify a unique name for the import profile.
- **Import protocol** – Select **OAI** from the drop-down list.
- **Physical source format** – **OAI XML** is selected for you.
- **Source format** – **MARC21 Bibliographic** is selected for you.
- **OAI base URL** – Enter the base URL of the OAI provider.
- **Authentication** – If the provider requires authentication, select this option to specify the user name and password.

Import Profile Details 1 2 3 4 5 6 [Cancel](#) [Save Draft](#) [Next](#)

Profile Type Repository

Profile Details

Profile name *

Profile description

Originating system Library of Congress File name patterns

Import Protocol OAI Cross walk No Yes

Physical source format OAI XML

Source format MARC21 Bibliographic Target format MARC21 Bibliographic

Active True

Scheduling

Files to import All New

Scheduler status Active Inactive

Scheduler * Not scheduled [Email Notifications](#)

OAI Details

OAI Base URL * [Connect and Edit](#)

Authentication

Username *

Password *

[Cancel](#) [Save Draft](#) [Next](#)

Figure 23 – Import Profile Details (Page 2)

- Click **Connect and Edit** to connect to the OAI provider and configure additional parameters associated with the provider (such as Metadata Prefix, Set, Harvest Start Date, and Encode Date).

The screenshot shows a form titled "OAI Details" with the following fields and controls:

- OAI Base URL ***: [Connect and Edit](#)
- Authentication**:
- Repository Name**:
- Earliest Date Stamp**: **Granularity**:
- Admin E-Mail/s**:
- Metadata Prefix**: (dropdown menu)
- Set**: (dropdown menu)
- Harvest Start Date**: (calendar icon) (clock icon) (trash icon)
- Encode Date**:

Buttons at the bottom: [Open Test Page](#), [Cancel](#), [Save Draft](#), [Next](#)

Figure 24 – Import Profile Details (Page 2) – Additional OAI Parameters

6 Click **Open Test Page** to test the OAI harvest.

The screenshot shows a dialog box titled "OAI Test" with the following options:

- Test By ID
- Test First Record
- Test Random Record

Buttons: [Test](#), [Close](#)

Figure 25 – OAI Test – Select Test Record

7 Specify a record to test using one of the following options: **Test by ID**, **Test first record**, or **Test random record** and then click **Test** to display the test results, which includes the record ID, harvest status, structure of the source record, and structure of the MARC record.

OAI Test

Test By ID
 Test First Record
 Test Random Record

Test

Record Identifier:

Status: **PASSED**

Source Record:

```

<record>
  <header>
    <identifier>http://libris.kb.se/resource/bib/2002005</identifier>
    <timestamp>1975-11-09T13:00:12Z</timestamp>
    <setSpec>license:CC0</setSpec>
    <setSpec>origin:LIBRIS</setSpec>
    <setSpec>authority:209520</setSpec>
  </header>
  <metadata>
    <record type="Bibliographic" xmlns="http://www.loc.gov/MARC21/slim">
      <leader>00625caa a22001817 r4500</leader>
      <controlfield tag="001">2002005</controlfield>
      <controlfield tag="005">20030328140012.0</controlfield>
    </record>
  </metadata>
</record>
  
```

Marc Record:

```

<?xml version="1.0" encoding="UTF-16"?>
<record>
  <leader>00625caa a22001817 r4500</leader>
  <controlfield tag="001">2002005</controlfield>
  <controlfield tag="005">20030328140012.0</controlfield>
  <controlfield tag="008">950512s1995 ne 000 0 eng c</controlfield>
  <datafield ind1=" " ind2=" " tag="035">
    <subfield code="9">9921004808</subfield>
  </datafield>
  <datafield ind1=" " ind2=" " tag="040">
    <subfield code="a">X</subfield>
  </datafield>
  <datafield ind1=" " ind2=" " tag="042">
    <subfield code="9">SMHB</subfield>
  </datafield>
  <datafield ind1=" " ind2=" " tag="084">
    <subfield code="a">ljz Torstensson, Klas</subfield>
    <subfield code="2">kssb/6</subfield>
  </datafield>
  <datafield ind1="4" ind2=" " tag="400">
  
```

Figure 26 – OAI Test – Example Results

8 Close the OAI Test dialog box and click **Next** to continue configuring the import profile.

Adding a Single Remote Digital Representation from a Remote Repository

Description

You can now add a single remote digital representation from a remote repository. This enables the quick testing of a single entity without performing a full harvest of the remote repository.

Technical Instructions

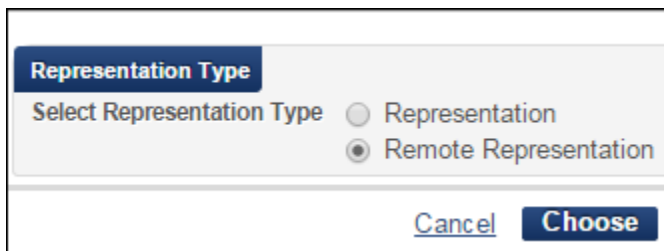
The following roles can access this feature:

- Digital Inventory Operator
- Digital Inventory Operator Extended (required for delete operations)

To add a single remote digital representation from a remote repository:

- 1 Do one of the following:
 - From the Alma Main Menu, select **Resource Management > Create Inventory > Add Digital Representation**.
 - Search in the repository for a digital title, click **Edit**, and then from the **Representations** tab of the Digital IE Resource Editor, click **Add Representation**.

The following is displayed:



Representation Type

Select Representation Type Representation Remote Representation

[Cancel](#) **Choose**

Figure 27 –Representation Type

- 2 Select **Remote representation** and click **Choose**. The following is displayed:

Representation Details

General Information
Created By: exl_impl Updated By: exl_impl

Title Selection
Select Title *

Remote Representation Details

Remote Digital Repository Instance * DigiTool OAI DC format Source Format OAI DC Format
Library * African Studies Library OAI Base URL * http://dc.03vg0053eu.hosted Connect
Record Identifier * Metadata Prefix * oai_dc Open Test Page

Figure 28 –Representation Details

- 3 In the **Select title** field, select the bibliographic record to which you want to attach the digital representation.
- 4 In the **Remote digital repository instance** field, select the remote digital repository where the digital representation is located.
The **Source Format** field displays the format of the metadata records that the remote repository instance supports for importing.
- 5 In the **Library** field, select the owning library associated with the remote representation.
- 6 In the **OAI base URL** field, enter the OAI provider's URL.
- 7 Click **Connect**. Alma checks which metadata prefixes and record identifiers are available.
- 8 Select the record identifier of the digital representation.
- 9 Select the appropriate metadata prefix.
- 10 Click **Open Test Page** to test the digital representation creation flow.
- 11 Click **Done**.

The digital remote representation is displayed when clicking **View It** from the item in the repository.

Other Resource Management Enhancements

- The following MARC 21 updates (for bibliographic, authority, holdings, classification, and community information formats) have been added to Alma in the February 2015 release:
 - Update No. 19 (October 2014)
 - Update No. 18 (April 2014)
 - Update No. 17 (September 2013)

- Update No. 16 (September 2013)

Refer to <http://www.loc.gov/marc/status.html> for additional details regarding these MARC 21 changes.

- The naming convention for files (bibliographic and holdings data) that are published to an OCLC FTP location has been enhanced to include a time stamp (using milliseconds) to ensure unique file names.
- The OriginatingSystemId place holder has been added to the Object and Thumbnail templates in the remote digital repository configuration. This field is taken from the originating system ID of the remote representation (ORIGINATING_SYSTEM_ID in HDEMETADATA).
- In the Repository Search, activation of portfolios and electronic packages are now limited to staff with one of the following roles:
 - Electronic Inventory Operator
 - Repository Manager
 - Trial Operator/Manager
 - Purchasing Operator/Manager
- Both the import and export of the DATE_OF_PUBLICATION and the PLACE_OF_PUBLICATION in the portfolio loader/export are now supported.
- Seven different scheduling options—one for each day of the week—are now available for publishing to Libraries Australia.
- The **Search External Resources** option is now available in the MD Editor menu when the open record is an NZ record.
- The Download file link in the Link a Set of Records to the Network Zone job report has been renamed **Local Records with Multiple Matches in the NZ**.

Fulfillment

The following sections describe the new functionality provided for the Fulfillment functional area in the February 2015 release of Alma.

New Options Added to Hold Shelf Sorting

Description

This feature enables additional options when selecting the criteria by which hold shelf items are sorted at a circulation desk.

Previously, there was no option to sort the hold shelf by either call number or requester ID. Both of these parameters have now been added, enabling the staff user to quickly identify items on the hold shelf or on the expired hold shelf. This decreases the time necessary to complete typical workflows at the circulation desk.

Technical Instructions

To enable selecting hold shelf sorting criteria at a circulation desk, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To enable hold shelf sorting criteria at a circulation desk:

- 1 On the Circulation Desks List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Circulation Desks**), click **Add Circulation Desk**. The Circulation Desk — General Information page appears.

Circulation Desk - General Information

You are configuring: Education Library

General Details

Code*

Name*

Primary Reading room desk

Picks from shelf Supports personal delivery

Additional Information

Description

Map

Printing Information

Printer

Creates return receipts

Creates loan receipts

Hold Shelf Information

Has hold shelf Notify patron of canceling expired hold

Digitization Department

Supports Digitization

Payment Information

Credit card

Debit card

Cash

Online

Check

Print receipt? No

Receipt copy Email

Self Check Information

Has self check

Figure 29 – Circulation Desk – General Information Page

Note: Ensure that you have selected a library in the **You are configuring:** drop down list at the top of the Fulfillment Configuration page.

- In the Hold Shelf Information section, select the **Has hold shelf** check box. The **Hold shelf sorting** field appears.

Hold Shelf Information

Has hold shelf

Notify patron of canceling expired hold

Has hold shelf processing

Hold shelf sorting

Maximum time on hold shelf (Days)

Figure 30 – Hold Shelf Sorting Field

- Click the arrow next to the field. The displayed options enable you to select sorting hold shelf items by the item's **Call Number** or **Requester ID**.

The screenshot shows a form with three sections: 'Hold Shelf Information', 'Digitization Department', and 'Payment Information'. In the 'Hold Shelf Information' section, there are checkboxes for 'Has hold shelf', 'Notify patron of canceling expired hold', and 'Has hold shelf processing'. To the right, there is a 'Hold shelf sorting' dropdown menu with a red box around it, listing options: 'Call Number', 'Hold Shelf Expiry Time', 'Hold Shelf Placement Time', 'Requester ID', 'Requester Name', and 'Title'. Below this is a field for 'Maximum time on hold shelf (Days)'.

Figure 31 – Hold Shelf Sorting Field Options

To sort active and expired hold shelf items by call number or requester ID:

- On the Active Hold Shelf Items page (**Fulfillment > Resource Requests > Active Hold Shelf**), click the drop-down arrow next to the **Sort by** field.

The screenshot shows the 'Active Hold Shelf Items' page. At the top, there is a 'Sort by' dropdown menu with 'Call Number' selected, highlighted by a red box. Below the menu, a list of items is shown. The first item is '1 The quantum ten : a story of passion, tragedy, ambition and science / Location: Main Library - Main Call Number: QC174.12.J66 2008 Barcode: 15193595 Held For: Flynn, Errol Preferred Identifier: 37765 Held Since: 26/03/2012 Held Until: 02/04/2012 Cancel Request | Update Expiry | Mark as Missing'.

Figure 32 – Active Hold Shelf Items Page — Sort by Field

The default option that is displayed is the option you selected for hold shelf sorting at the circulation desk, in the **Hold shelf sorting** field (as described in the previous procedure).

- Select the criteria by which to sort the active hold shelf items. The available criteria include **Call Number** and **Requester ID**.

When selecting **Requester ID**, the results are sorted by the user's **Preferred Identifier** value. The preferred identifier can be configured on the CustomerParameters Mapping Table, accessible from the User Management Configuration Menu (for details, see the **Configuring Other Settings** section of the Configuring User Management chapter in the *Alma Administration Guide* or Alma Online Help).

You can sort expired hold shelf items on the Expired Hold Shelf Items page (**Fulfillment > Resource Requests > Expired Hold Shelf**) in the same manner as you sort active hold shelf items.

Additional Reading List Citation Attributes

Description

This feature enables configuring citation attribute types and citation attributes, and mapping them to each other.

For example, Alma comes out-of-the-box with the following configurations:

- **Citation Attribute Type — Requested_format** (indicates the format of the requested citation)
- **Citation Attributes — Book, Audio, CD, and DVD**
- **Citation Attributes to Citation Attributes Types** — Each of the Citation Attributes are mapped to the **Requested_format** attribute type, indicating that **Book, Audio, CD, and DVD** are requested formats for resources.

You can add additional attribute types and attributes, and map them to each other, as needed. Up to five citation attributes can be added per citation attribute type.

Technical Instructions

To configure citation attribute types and citation attributes and to map them to each other, you must have one of the following roles:

- General System Administrator
- Fulfillment Administrator

To attach citation attributes to reading list citations, you must have one of the following roles:

- Courses Operator
- Courses Manager
- Fulfillment Services Operator
- Fulfillment Services Manager

To configure citation attribute types:

- 1 On the Citation Attributes Types Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Citation Attributes Types**), locate the **Quick Add** section at the bottom of the page.

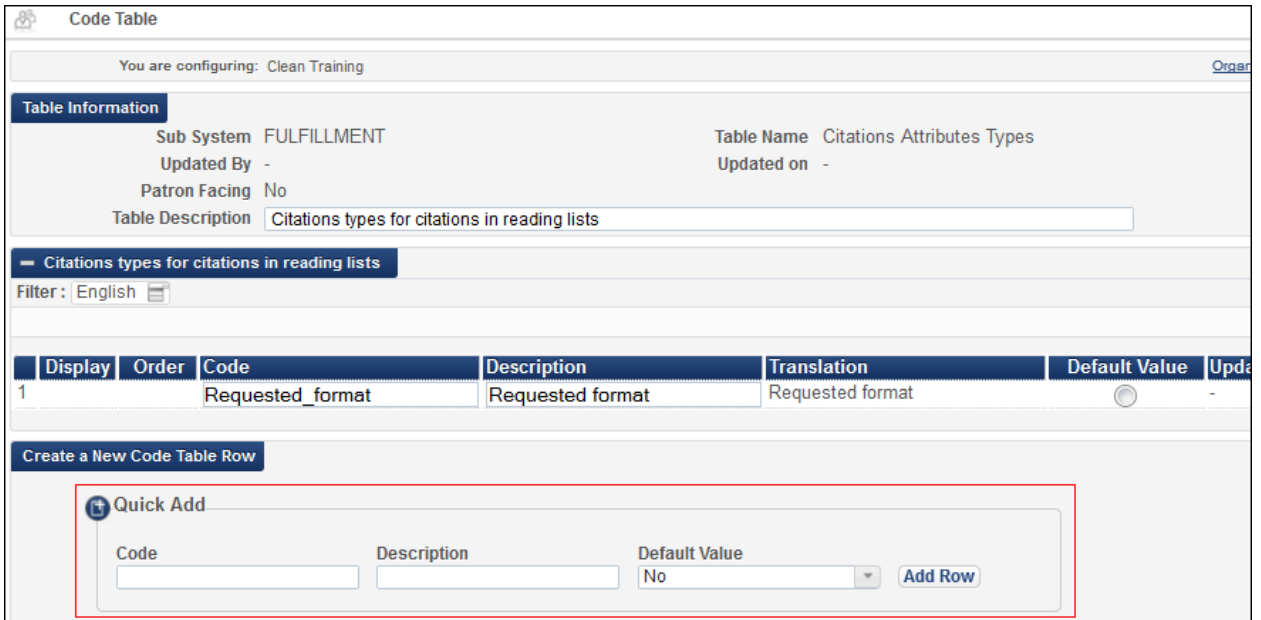


Figure 33 – Citations Attributes Types Code Table Page — Quick Add Section

- 2 Enter a code and description in the relevant fields, and click **Add Row**. The value displays in the table on the page.

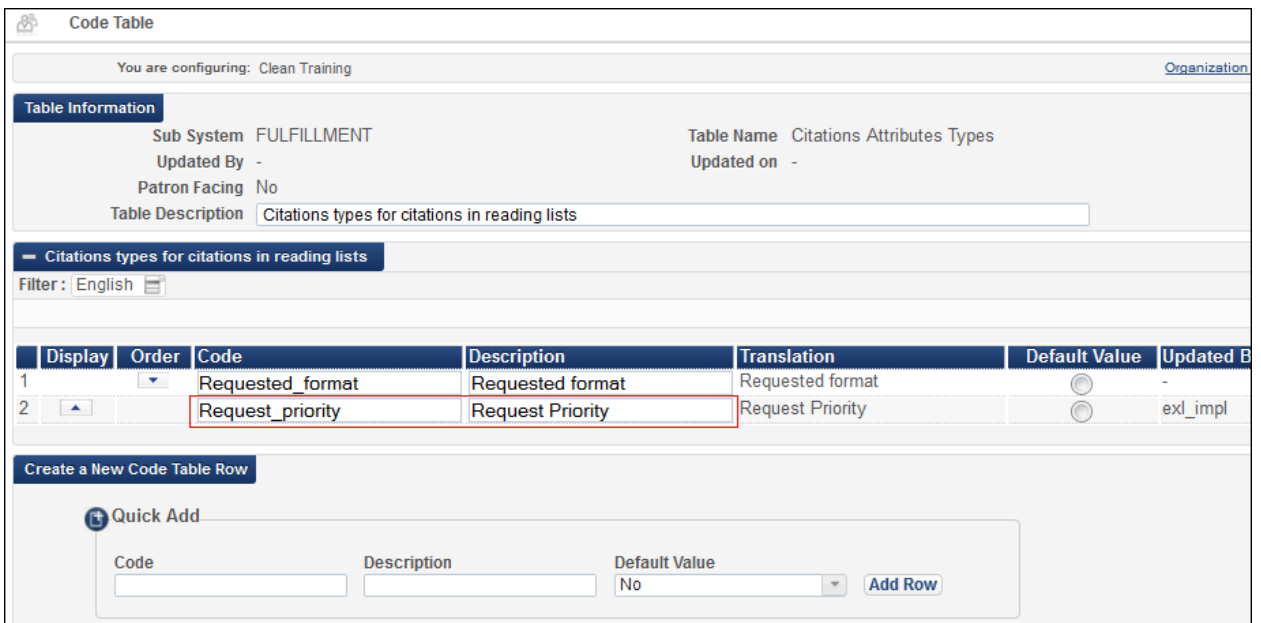


Figure 34 – Citations Attributes Types Code Table Page — Added Citation Attribute Type

Note: The Default value field is not relevant in this table.

To configure citation attributes:

- 1 On the Citation Attributes Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Citation Attributes**), locate the **Quick Add** section at the bottom of the page.

The screenshot shows the 'Code Table' configuration page for 'Clean Training'. The page includes a 'Table Information' section with fields for Sub System (FULFILLMENT), Table Name (Citations Attributes), Updated By, Patron Facing (No), and Table Description (Citations attributes for citations in reading lists). Below this is a table with columns: Display, Order, Code, Description, Translation, Default Value, and Update. The table contains four rows: 1. BOOK, Book, Book, No, -; 2. AUDIO, Audio, Audio, No, -; 3. CD, CD, CD, No, -; 4. DVD, DVD, DVD, No, -. At the bottom, there is a 'Quick Add' section with a red border, containing input fields for Code, Description, and a Default Value dropdown menu set to 'No', along with an 'Add Row' button.

Display	Order	Code	Description	Translation	Default Value	Update
1		BOOK	Book	Book	<input type="radio"/>	-
2		AUDIO	Audio	Audio	<input type="radio"/>	-
3		CD	CD	CD	<input type="radio"/>	-
4		DVD	DVD	DVD	<input type="radio"/>	-

Figure 35 – Citations Attributes Code Table Page – Quick Add Section

- 2 Enter a code and description in the relevant fields, and click **Add Row**. The values display in the table on the page.

Code Table

You are configuring: Clean Training

Table Information

Sub System FULFILLMENT Table Name Citations Attributes
 Updated By - Updated on -
 Patron Facing No
 Table Description Citations attributes for citations in reading lists

— Citations attributes for citations in reading lists

Filter: English

	Display	Order	Code	Description	Translation	Default Value	Up
1			BOOK	Book	Book	<input type="radio"/>	-
2	▲		AUDIO	Audio	Audio	<input type="radio"/>	-
3	▲		CD	CD	CD	<input type="radio"/>	-
4	▲		DVD	DVD	DVD	<input type="radio"/>	-
5	▲		High	High	High	<input type="radio"/>	ex
6	▲		Medium	Medium	Medium	<input type="radio"/>	ex
7	▲		Low	Low	Low	<input type="radio"/>	ex

Create a New Code Table Row

Quick Add

Code Description Default Value Add Row

No

Figure 36 – Citations Attributes Code Table Page — Added Citation Attributes

Note: The **Default value** field is not relevant in this table.

To map citation attribute types to citation attributes:

- 1 On the CitationsAttributesToCitationsAttributesTypes Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Courses > Citation Attributes to Citation Attributes Types**), locate the **Quick Add** section at the bottom of the page.

Mapping Table

You are configuring: Clean Training [Organization](#)

Table Information

Sub System FULFILLMENT Table Name CitationsAttributesToCitationsAttributesTypes
 Updated By - Last Updated -
 Table Description

Mapping Table Rows

	Enabled	Attribute	Attribute Type	Updated By	Last Updated
1	<input checked="" type="checkbox"/>	Book	Requested format	-	-
2	<input checked="" type="checkbox"/>	DVD	Requested format	-	-
3	<input checked="" type="checkbox"/>	CD	Requested format	-	-
4	<input checked="" type="checkbox"/>	Audio	Requested format	-	-

Create a New Mapping Row

Quick Add

Attribute

Attribute Type

Figure 37 – CitationsAttributesToCitationsAttributesTypes Mapping Table Page — Quick Add Section

- 2 In the **Attribute** field, select a citation attribute.
- 3 In the **Attribute type** field, select a citation attribute type to which you want to assign to the selected attribute.
- 4 Click **Add Row**. The mapped values appear in the Mapping Table Rows table.

Mapping Table

You are configuring: Clean Training Organization Un

Table Information

Sub System FULFILLMENT Table Name CitationsAttributesToCitationsAttributesTypes
 Updated By - Last Updated -
 Table Description

Mapping Table Rows

	Enabled	Attribute	Attribute Type	Updated By	Last Updated
1	<input checked="" type="checkbox"/>	Book	Requested format	-	-
2	<input checked="" type="checkbox"/>	DVD	Requested format	-	-
3	<input checked="" type="checkbox"/>	CD	Requested format	-	-
4	<input checked="" type="checkbox"/>	Audio	Requested format	-	-
5	<input checked="" type="checkbox"/>	High	Request Priority	Ex Libris	08/01/2015

Create a New Mapping Row

Quick Add

Attribute

Attribute Type

Figure 38 – CitationsAttributesToCitationsAttributesTypes Mapping Table Page — Mapped Values

The attribute is mapped to the indicated attribute type. In the above image, **High** is mapped as a value for **Request Priority**.

To attach attributes to reading list citations:

- 1 On the Reading Lists Task List page (**Fulfillment > Course Reserves > Reading Lists**), select **Actions > Work On** for a reading list. The Edit Reading List page opens, displaying the contents of the reading list.

[Cancel](#) [Print Slip](#) [Being Prepared](#) [Change Status](#) [Print Slip Report](#) [Place Request](#) [Remove Alerts](#) [Remove Cit](#)

Course Code: BIO101 Section: - Course Name: Human Biology
 Processing Department: Art and Architecture Instructors: Alan Dubb

Reading List Information

Code: * bio102
 Name: * Biology
 Owner:
 Status: Being Prepared
 Due Back Date: 04/30/2015

[Citations](#) [Notes](#)

Alerts: All Citation/Locate Status: All Citation Type: All

[Add Repository Citation](#) [Add Non-Repository Citation](#) [Add Brief](#)

Select All

- [Integrative biology](#)
Physical Article By Integrative biology (Online)
 ISSN: 1093-4391
 Subject: Biology Periodicals.
Availability: Electronic version at Wiley Online Library: Full Text
 Request Status: Being Prepared
 Resource Locate Status: Resource Located
 Citation Attributes: Requested format: DVD
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Portfolio List](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#)
- [Systematic biology](#)
Physical Article By Systematic biology (Online)
 ISSN: 1063-5157
 Subject: Biology Classification Periodicals. -- Biology Periodicals. -- Biologie Périodiques. Classification and others
Availability: Electronic version at EBSCOhost Academic Search Complete: Full Text
 Electronic version at ProQuest Aquatic Science Journals New Platform: Full Text
 Request Status: Being Prepared
 Resource Locate Status: Resource Located
[Edit](#) | [Resource Locate](#) | [Set Complete](#) | [Manage Fulfillment Options](#) | [Portfolio List](#) | [Remove](#) | [Duplicate](#) | [Print Slip](#) | [Detach from Repository](#) | [Citation Details](#)
- [Molecular biology](#)
Physical Article By Molecular biology (Online)
 ISSN: 0026-8933
 Subject: Molecular biology Periodicals. -- Biology Periodicals. -- Cytogenetics Periodicals. and others
Availability: Electronic version at ProQuest Aquatic Science Journals New Platform: Full Text
 Electronic version at Springer Standard Collection: Full Text

Figure 39 – Edit Reading List Page

2 Select **Edit** for a reading list citation. The Edit Reading List Citation page opens.

Edit Reading List Citation

Reading List Information

Reading List Code: bio102 Reading List Name: Biology Reading List Owner: -

Reading List Status: BeingPrepared

Resource Information

Article\Chapter Title *	<input type="text" value="Integrative biology"/>
Journal Title	<input type="text"/>
Author	<input type="text" value="Integrative biology (Online)"/>
Volume	<input type="text"/>
Author Initials	<input type="text"/>
Issue	<input type="text"/>
ISSN	<input type="text" value="1093-4391"/>
LCCN	<input type="text"/>
OCLC Number	<input type="text"/>
DOI	<input type="text"/>
PMID	<input type="text"/>
Publisher	<input type="text"/>
Place of Publication	<input type="text" value="New York, N.Y. :"/>
Additional Person Name	<input type="text"/>
Source	<input type="text"/>
Series Title Number	<input type="text"/>
Note	<input type="text"/>
Chapter	<input type="text"/>
Pages	<input type="text"/>
Start Page	<input type="text"/>
End Page	<input type="text"/>
Publication Date	<input type="text"/>

Citation Attributes

+ Quick Add

Figure 40 – Edit Reading List Citation Page

- 3 In the **Quick Add** section at the bottom of the page, select a citation attribute type and the citation attribute you want to map, and click **Add Citation Attribute**. The selected values display in a table at the bottom of the page.

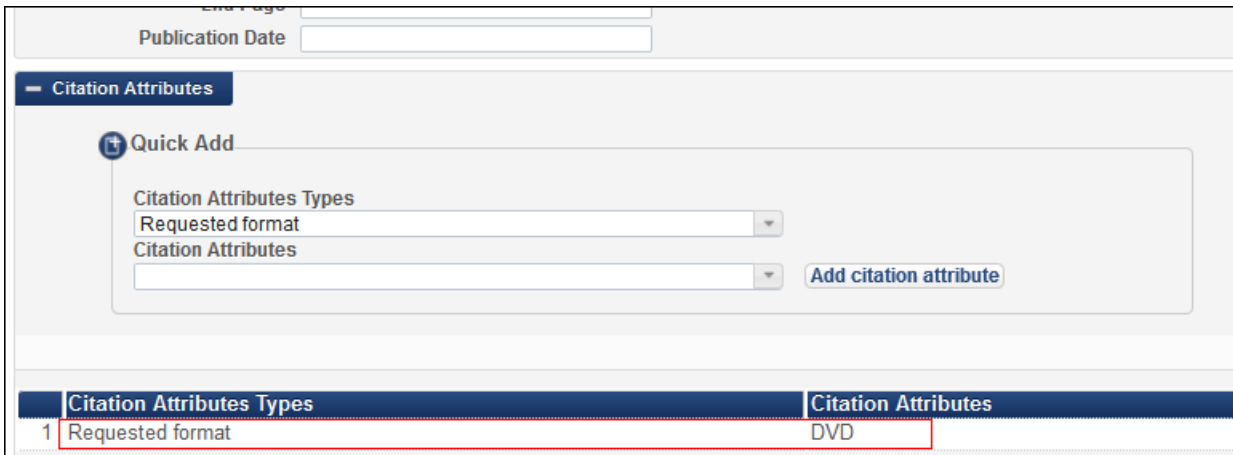


Figure 41 – Reading List — Added Citation Attribute

- Click **Save**. The added citation attribute displays in the reading list information on the Edit Reading List page.

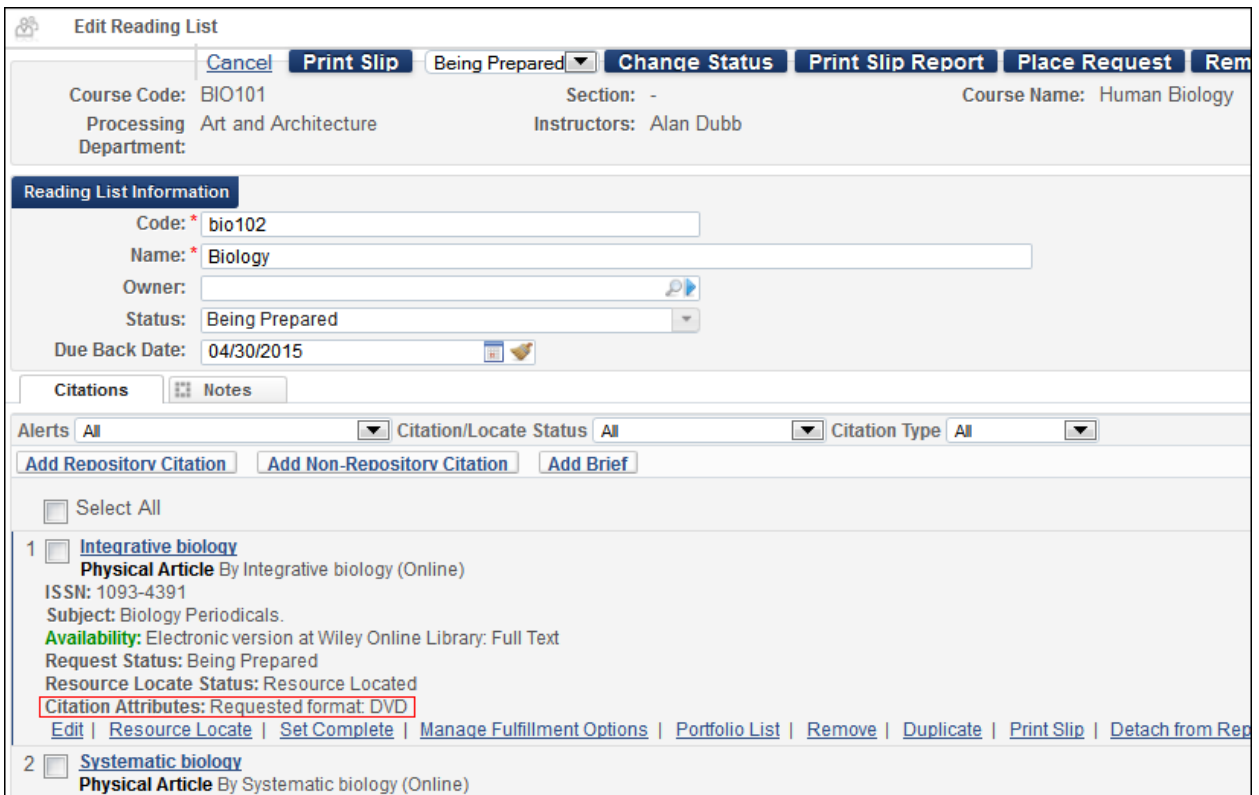


Figure 42 – Edit Reading List Page — Added Citation Attribute

Other Fulfillment Enhancements

- The Calendar Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Library > Opening Hours**), which manages a library's opening hours, can now be

accessed through the **Opening Hours** option on the Fulfillment Advanced Tools menu (**Fulfillment > Advanced Tools > Opening Hours**) by the following Alma users:

- Circulation Desk Manager
- Circulation Desk Operator
- Circulation Desk Operator Limited
- Requests Operator

By default, these roles cannot access this option. To enable these roles, contact Ex Libris Support.

- A new report with more detailed information is now available for the **Notifications - Send Courtesy Notices and Handle Loan Renewals** job. This report, which is displayed when you click the **View Report Details** link in the status icon's pop-window on the Monitor Jobs page (**Administration > Manage Jobs > Monitor a Job > History** tab), also enables you to preview records for renewed loans and sent courtesy notices.
- A Fulfillment Administrator can now add and delete user block definitions on the User Block Definitions Mapping Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Patron Configurations > User Block Definitions**).
- The **External Request ID** label on the Resource Request Monitoring page (**Fulfillment > Resource Requests > Monitor Requests & Item Processes**) has been changed to **External Identifier**.
- In the Digitization Request form on the Primo Get It tab, the **Comment** field now displays (by default) with the label **Part to Digitize**.
- On the Discovery Interface Labels Code Table page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Discovery Interface Display Logic > Labels**), a colon was hard-coded for selected Primo Get It tab labels and could not be customized. The colon is now part of the label and can be customized, but any prior customizations to these labels will not contain the colon. Therefore, these previously customized labels should be reviewed and a colon added, where necessary. The affected labels are:
 - **c.uresolver.getit2.holding_list.accession_number**
 - **c.uresolver.getit2.public_notes**Additionally, the **c.uresolver.getit2.holding_list.availability** and **c.uresolver.getit2.holding_list.holdings** labels now affect only the holdings list. The following new labels are relevant for the items list:
 - **c.uresolver.getit2.item_list.availability**
 - **c.uresolver.getit2.item_list.holdings**

Users who customized the **c.uresolver.getit2.holding_list.availability** and **c.uresolver.getit2.holding_list.holdings** labels must re-customize the **c.uresolver.getit2.item_list.availability** and **c.uresolver.getit2.item_list.holdings** labels for their customizations to affect the items list.

- The loan status in the Primo My Account tab (for a single loan view) now includes the maximum date until which the loan can be renewed (when the request has **view = full**).
The displayed format is: **[loan status/process]. Maximum renewal date is [date]**
- The resource sharing request ID was added to print slip report from the Pick from Shelf task list (both in Excel format and in XML format).

Resource Sharing

The following sections describe the functions provided for Resource Sharing in the February 2015 release of Alma.

Configuring Additional Locate Attributes

Description

This feature enables controlling the fields that Alma will use for the locate process. The configuration options set the fields that configure the following:

- **Lending-side Locate** — Determines how lending requests will be matched with the local resource sharing library's inventory. Configurable on the resource sharing library's configuration page.
- **Borrowing-side Locate** — Determines how a partner's ability to fulfill a request will be checked—that is, which metadata fields from the borrowing request are used by the locate profile. Configurable on the locate profile configuration page.
- **Self-Ownership** — Determines how an institution's inventory will be checked for local ownership, to block a resource sharing borrowing request submitted by the Alma request form. Configured by the same resource sharing library configuration that controls how the lending requests are located.

If no configuration is done, Alma defaults to use the following metadata fields in the indicated order, if they are populated in the request form:

- LCCN
- OCLC Number
- Title, ISBN/ISSN, Author, Year

Technical Instructions

The following role can configure the resource sharing library to define how the lending locate and self-ownership checks operate:

- General Administrator

The following role can define the locate profiles for defining how the borrowing-side locate operates:

- Fulfillment Administrator

To configure additional search fields when searching in the local institution (performing a lending-side locate and a self-ownership check):

- 1 On the List of Libraries page (**Administration > General Configuration > Configuration Menu > Libraries > Add a Library or Edit Library Information**), select **Edit** for the Resource Sharing Library. The Organization Unit Details page opens.

The screenshot shows the 'Organization Unit Details' page for a library named 'Resource Sharing Library'. The page is divided into several sections:

- Organization Unit Name:** Resource Sharing Library
- Organization Unit Type:** Library
- Path:** EXLDEV1.EXLDEV1_INST.RES_SHARE
- Summary:** Contact Information, Calendar Management, IP Definitions
- General Details:**
 - Organization Unit Name:** Resource Sharing Library
 - Code:** RES_SHARE
 - Description:** Temporarily manages inventory that is sent to or received from resource sharing partners
 - Path:** EXLDEV1.EXLDEV1_INST.RES_SHARE
 - Default Location for Acquisition:** [Dropdown]
 - Campus:** [Dropdown]
 - Proxy:** [Dropdown]
- Resource Sharing Information:**
 - Is Resource Sharing Library:**
 - Itemless:**
 - ISO Symbol:** ALMA_ISO_MAIN
 - Borrowing Setup:**
 - Cancel request on locate failure:**
 - Automatically activate locate profile:**
 - Default Location:** Borrowing Resource Sharing Reque
 - Default Pickup Location:** Main Library
 - Lending Setup:**
 - Automatically Locate Resource:**
 - Default Location:** Lending Resource Sharing Reques
 - Locate By Fields:**

Figure 43 – Organization Unit Details Page

- 2 In the **Resource Sharing Information** section, select the **Locate by fields** check box.

The screenshot shows a configuration interface for resource sharing. It is divided into several sections:

- Resource Sharing Information:** Includes 'Is Resource Sharing Library' (checked), 'Itemless' (unchecked), and 'ISO Symbol' (ALMA_ISO_MAIN).
- Borrowing Setup:** Includes 'Cancel request on locate failure' (unchecked), 'Automatically activate locate profile' (unchecked), 'Default Location' (Borrowing Resource Sharing Reque), and 'Default Pickup Location' (Main Library).
- Lending Setup:** Includes 'Automatically Locate Resource' (checked) and 'Default Location' (Lending Resource Sharing Reques).
- Locate By Fields:** This section is highlighted with a red box and contains a checked 'Locate By Fields' checkbox and five unchecked checkboxes for 'Title', 'Author', 'ISBN / ISSN', 'OCLC Number', and 'LCCN (010)'.

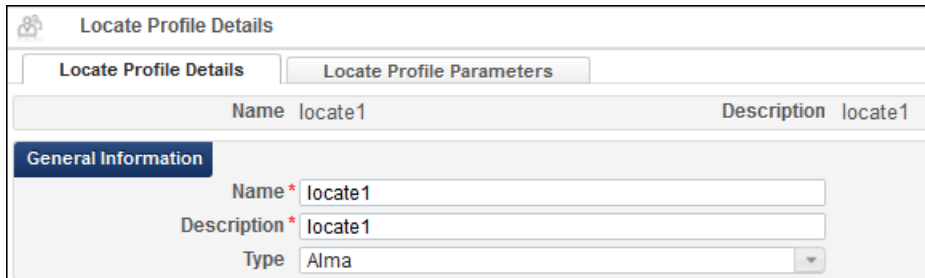
Figure 44 – Locate By Fields Check Box

The page displays the new search fields, as follows:

- Title
 - Author
 - ISBN/ISSN
 - OCLC Number
 - LCCN
- 3 Select the fields by which you want resources to be searched for in the local resource sharing library, and click **Save**.

To configure additional search fields when searching in a remote institution (performing a borrowing-side locate):

- 1 On the Locate Profiles List page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Resource Sharing > Locate Profiles**), select **Actions > Edit** for a locate profile of **Type = Alma**. The Locate Profile Details page opens.

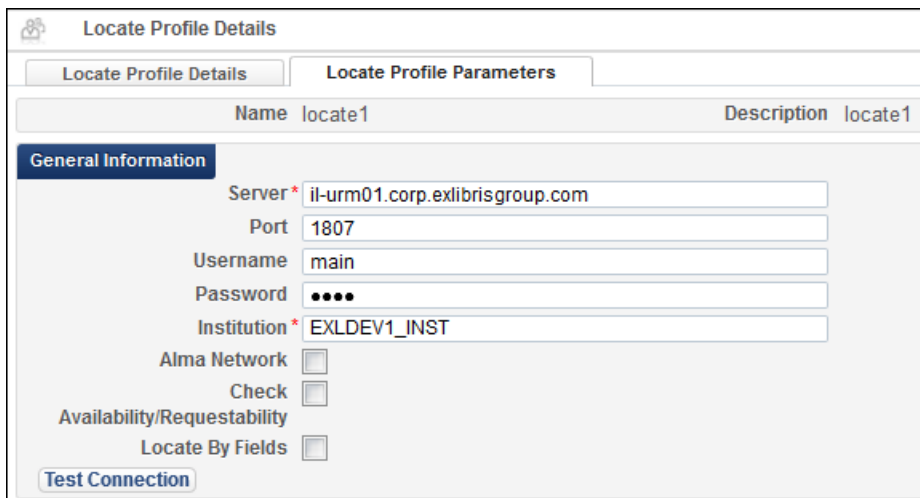


The screenshot shows the 'Locate Profile Details' page with the 'General Information' tab selected. The page has two tabs: 'Locate Profile Details' and 'Locate Profile Parameters'. Below the tabs is a header with 'Name locate1' and 'Description locate1'. The 'General Information' section contains three input fields: 'Name *' with the value 'locate1', 'Description *' with the value 'locate1', and 'Type' with a dropdown menu set to 'Alma'.

Figure 45 – Locate Profile Details Page

Note: The configuration options described below are supported only for locate profiles of **Type = Alma**.

- 2 Click the **Locate Profile Parameters** tab. The following page appears:



The screenshot shows the 'Locate Profile Details' page with the 'Locate Profile Parameters' tab selected. The page has two tabs: 'Locate Profile Details' and 'Locate Profile Parameters'. Below the tabs is a header with 'Name locate1' and 'Description locate1'. The 'General Information' section contains several input fields and checkboxes: 'Server *' with the value 'il-urm01.corp.exlibrisgroup.com', 'Port' with the value '1807', 'Username' with the value 'main', 'Password' with masked characters '••••', 'Institution *' with the value 'EXLDEV1_INST', 'Alma Network' checkbox (unchecked), 'Check' checkbox (unchecked), 'Availability/Requestability' checkbox (unchecked), and 'Locate By Fields' checkbox (unchecked). A 'Test Connection' button is located at the bottom left of the form.

Figure 46 – Locate Profile Details Page — Locate Profile Parameters Tab

- 3 Select the **Locate by fields** check box.

Figure 47 – Locate Profile Details Page — Locate By Fields Check Box and New Fields

The page displays the new search fields, as follows:

- Title
- Author
- ISBN/ISSN
- OCLC Number
- LCCN

- 4 Select the fields by which you want resources to be searched for in the remote institution, and click **Save**. Alma uses these fields when the specified locate profile is used in a search by the resource sharing partner (that is, when clicking **Locate Resource** on the Resource Sharing Borrowing Requests page).

Lending Request: Locate Multiple Results

Description

When performing a Locate action manually for a lending request, multiple located results are displayed, enabling you to select a resource. Previously, when a search returned multiple results, the search results would fail. Additionally, the search value used by Alma for the locate action displays, enabling the operator to modify the search value and retry the locate action.

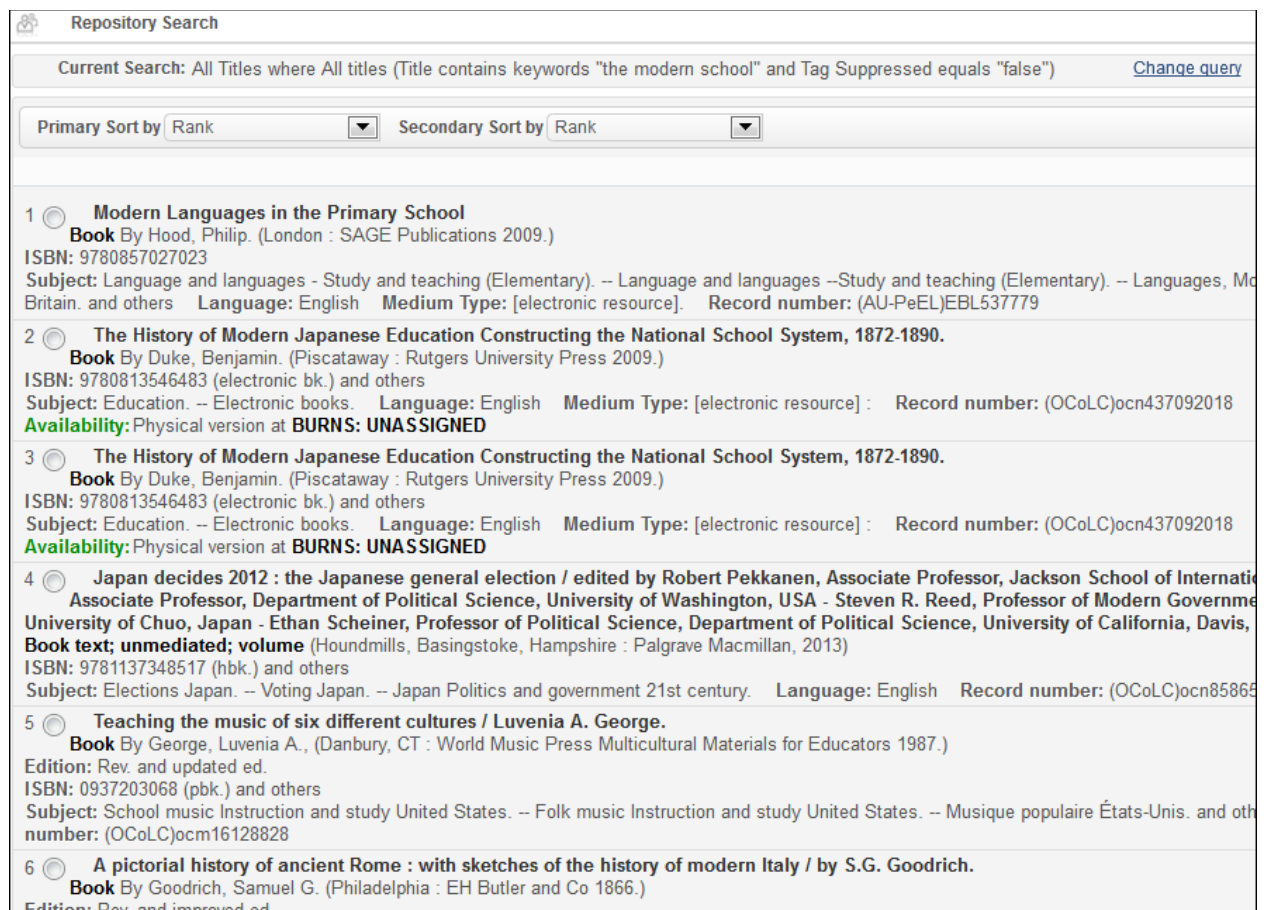
Technical Instructions

The following roles can view multiple results for a lending request:

- Fulfillment Services Operator
- Fulfillment Services Manager

To view multiple results for a lending request:

- 1 On the Resource Sharing Lending Requests Task List page (**Fulfillment > Resource Sharing > Lending Requests**), select **Add > Manually** to manually add a request.
- 2 Click **Locate** for the newly created request. If multiple results are found, they display on the Repository Search page.



The screenshot shows the 'Repository Search' interface. At the top, it displays the current search criteria: 'All Titles where All titles (Title contains keywords "the modern school" and Tag Suppressed equals "false")'. Below this, there are dropdown menus for 'Primary Sort by' and 'Secondary Sort by', both set to 'Rank'. The search results are listed in a table-like format with the following entries:

- 1 **Modern Languages in the Primary School**
Book By Hood, Philip. (London : SAGE Publications 2009.)
ISBN: 9780857027023
Subject: Language and languages - Study and teaching (Elementary). -- Language and languages --Study and teaching (Elementary). -- Languages, Mod Britain. and others Language: English Medium Type: [electronic resource]. Record number: (AU-PeEL)EBL537779
- 2 **The History of Modern Japanese Education Constructing the National School System, 1872-1890.**
Book By Duke, Benjamin. (Piscataway : Rutgers University Press 2009.)
ISBN: 9780813546483 (electronic bk.) and others
Subject: Education. -- Electronic books. Language: English Medium Type: [electronic resource] : Record number: (OCoLC)ocn437092018
Availability: Physical version at **BURNS: UNASSIGNED**
- 3 **The History of Modern Japanese Education Constructing the National School System, 1872-1890.**
Book By Duke, Benjamin. (Piscataway : Rutgers University Press 2009.)
ISBN: 9780813546483 (electronic bk.) and others
Subject: Education. -- Electronic books. Language: English Medium Type: [electronic resource] : Record number: (OCoLC)ocn437092018
Availability: Physical version at **BURNS: UNASSIGNED**
- 4 **Japan decides 2012 : the Japanese general election / edited by Robert Pekkanen, Associate Professor, Jackson School of International Associate Professor, Department of Political Science, University of Washington, USA - Steven R. Reed, Professor of Modern Government University of Chuo, Japan - Ethan Scheiner, Professor of Political Science, Department of Political Science, University of California, Davis, Book text; unmediated; volume** (Houndmills, Basingstoke, Hampshire : Palgrave Macmillan, 2013)
ISBN: 9781137348517 (hbk.) and others
Subject: Elections Japan. -- Voting Japan. -- Japan Politics and government 21st century. Language: English Record number: (OCoLC)ocn85865
- 5 **Teaching the music of six different cultures / Luvenia A. George.**
Book By George, Luvenia A., (Danbury, CT : World Music Press Multicultural Materials for Educators 1987.)
Edition: Rev. and updated ed.
ISBN: 0937203068 (pbk.) and others
Subject: School music Instruction and study United States. -- Folk music Instruction and study United States. -- Musique populaire États-Unis. and oth number: (OCoLC)ocm16128828
- 6 **A pictorial history of ancient Rome : with sketches of the history of modern Italy / by S.G. Goodrich.**
Book By Goodrich, Samuel G. (Philadelphia : EH Butler and Co 1866.)
Edition: Rev. and improved ed.

Figure 48 – Multiple Results for Locate Action on Lending Request

Note that the search value also displays on the top of the page. You can select the **Change Query** link at the top of the page to change the search value that was used.

- 3 Select the relevant resource and click the **Select** button. The request displays on the Resource Sharing Lending Requests Task List page with the **Resource Locate Status of Resource Located**.

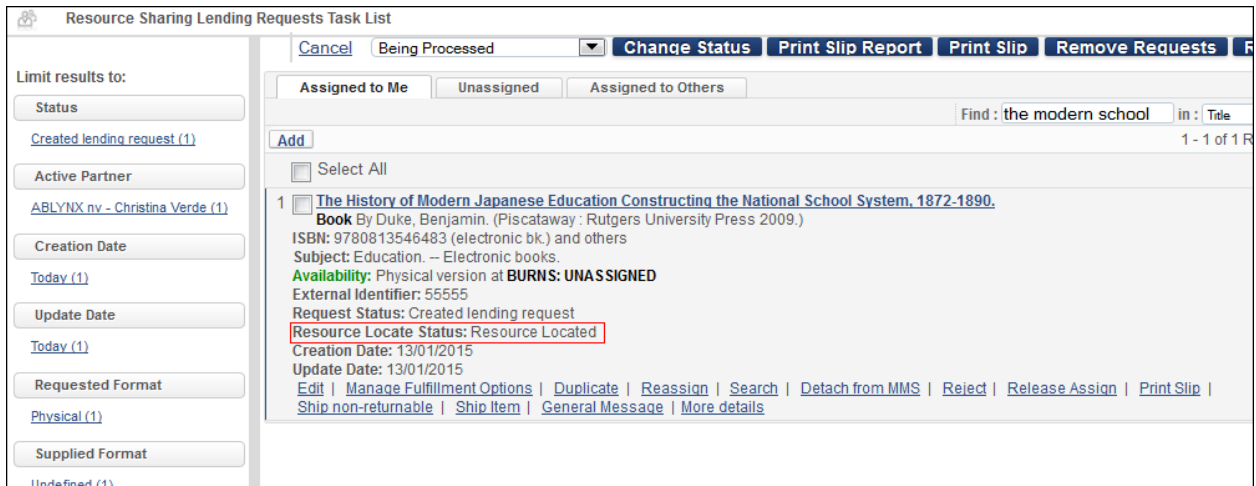


Figure 49 – Resource Sharing Lending Request — Resource Located

Other Resource Sharing Enhancements

- When creating a Resource Sharing Borrowing Request (**Fulfillment > Resource Sharing > Borrowing Request**), select an **Add** option and proceed to the Resource Sharing Borrowing Request page), the **Needed by** field has been changed to **Date needed by**.
- The removal of lending requests has been aligned with the removal of borrowing requests:
 - Deleted lending requests are now internally marked as Deleted in the Alma database, but are not physically deleted.
 - When deleting requests, the number of successfully deleted requests appears in an informational message. If a request cannot be deleted, an error message is issued.
 - The completed and deleted requests have been added to the anonymization job.
- The **Request note** field in both borrowing and lending requests was increased to 1000 characters.
- The Closed Library Due Date Management policy defined for the resource sharing library's fulfillment units will now affect resource sharing due dates because Alma now takes the closed times of the library into account when calculating resource sharing due dates. As a result, if a library's policy is to move the due date to the end of the next open day, the due date may not be sufficient for the borrowing to lending library defined return delivery period. To prevent this from occurring, the resource sharing library should ensure that its Closed Library Due Date Management policy is **Move Backward – move to end of previous open day**. This ensures that the due date allows ample time for the borrowing library to return the item to the lending library.

Administration

The following sections describe the functions provided for Administration in the February 2015 release of Alma.

Status Pop-Up Added to Monitor Jobs

A new pop-up window, providing details of a job's status as well as a link to a detailed report, is now available upon clicking the icon in the **Status** column of the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs > History** tab).

For example:

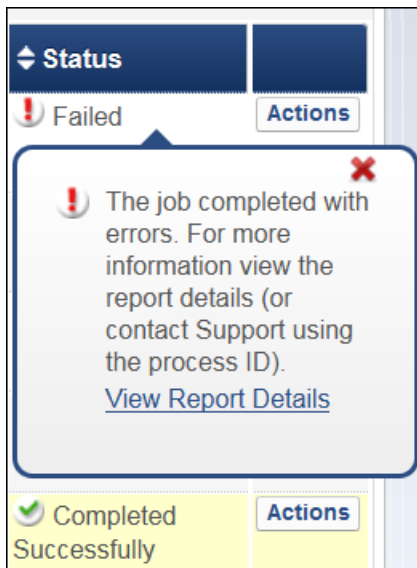


Figure 50 – Status Icon Pop-Up Window

Other Administration Enhancements

- When changing the value of the **Resource Sharing Library** field on the User Details page (**Administration > User Management > Find and Manage Users**, select **Actions > Edit** for an existing user), the new value of the field is not overridden during an SIS/User API update.

Analytics

The following section describes the functions provided for Analytics in the February 2015 release of Alma.

Enhancements to the Funds Expenditure Subject Area

Description

The following enhancements have been implemented to the Invoice Line dimension of the Fund Expenditure SA:

- The words **Invoice** or **Invoice Line** have been added to all of the fields to indicate whether the field is concerning the invoice or invoice line.
- Several fields concerning VAT have been added, as described in the following table:

New Name	Previous Name
Invoice Line-VAT Code	The invoice line VAT code.
Invoice Line-VAT Code Description	The invoice line VAT code description
Invoice Line-VAT Code %	The invoice line VAT code percent
Invoice Line-VAT Note Data	The invoice line VAT amount
Invoice Status	Invoice Status (Closed, In Review, Ready to be paid, In Approval, Waiting for Payment)
Invoice-VAT per Invoice Line	Indicates whether the VAT is calculated at the invoice or invoice line level
Invoice-Expended from Fund	Indicates whether the VAT is expended from the invoice line's funds. If it not, a new adjustment invoice line is added to the invoice which includes invoice VAT amounts
Invoice-VAT Amount	The total VAT amount
Invoice-VAT Type	Vat Type- values: Exclusive/Inclusive/Line Exclusive. Indicates whether the VAT is Exclusive or Inclusive in the invoice total amount

New Name	Previous Name
Invoice-VAT Code	The invoice VAT code
Invoice-VAT Code Description	The invoice Vat code description
Invoice-VAT Code %	The invoice VAT Code percent
Invoice-Report Tax	Indicates if an invoice needs to report state tax.

- The order of the fields has been changed to be clearer and more logical.

Technical Instructions

The Design Analytics role can access this enhancement.

To access this feature:

Select **Funds Expenditure > Invoice Line**:

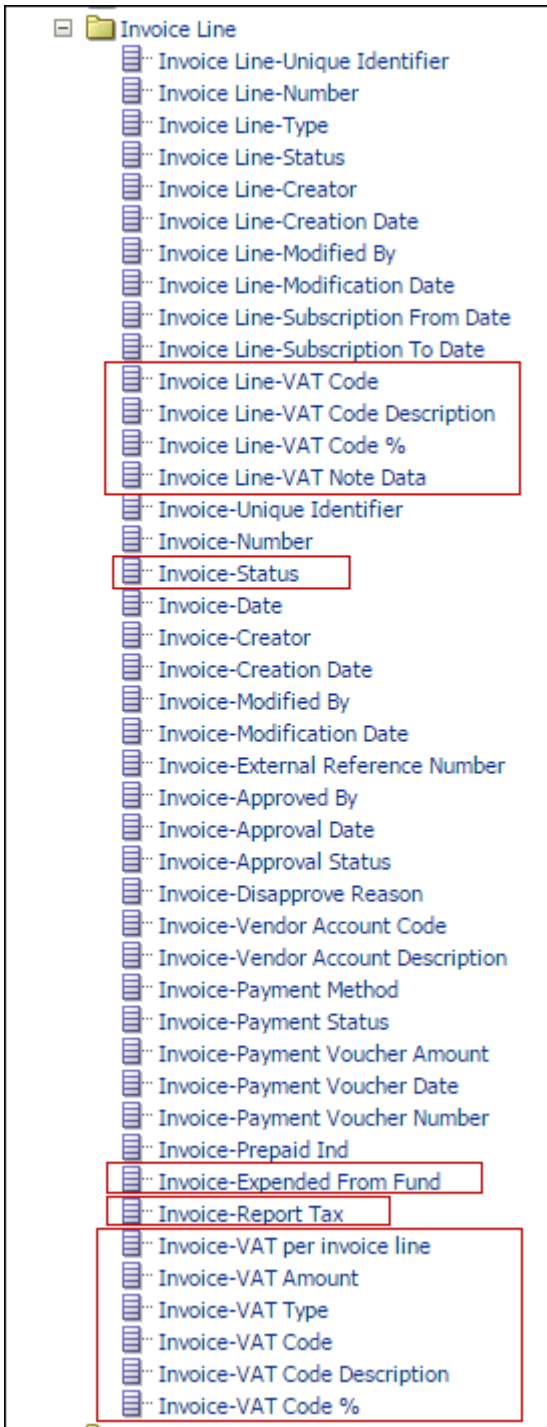


Figure 51 – Funds Expenditure – Invoice Line

The following is an example of reports using the new fields added in this release:

Invoice-Status	Invoice-Status	Invoice-VAT per invoice line	Invoice-VAT Amount	Invoice-VAT Type	Invoice-VAT Code %	Invoice-Expended From Fund	Invoice-Report	
Closed	Closed	No	0	Inclusive		Yes	No	
InApproval	InApproval	No	5	Line Exclusive		Yes	No	
			5	Line Exclusive		Yes	No	
InReview	InReview	No	0	Inclusive		Yes	No	
				Line Exclusive		Yes	No	
		Yes	18	Exclusive		Yes	No	
Ready to be paid	Ready to be paid	No	0	Inclusive		Yes	No	
				0	Line Exclusive		Yes	Yes
			11	Inclusive	12.50	No	No	
Waiting for Payment	Waiting for Payment	No	0	Inclusive		Yes	No	
			9	Inclusive		No	No	
			9			Yes	No	
			10	Exclusive		No	No	
			10			Yes	No	

Figure 52 –Funds Expenditure – Invoice Fields Report

Invoice Line-VAT Code	Invoice Line-VAT Note Data	Invoice Line-VAT Code %	Invoice Line-VAT Code Description
0.00		34.80	
0.65			
1.33			
1.64			
1.99			
10			
11.11			
11.29		34.80	
2.27			
2.50			
2.73			
2.86			
3.00			
3.36			
3.89			
5.23			
6.25		12.50	
6.36			
6.82			
7.00			

Figure 53 –Funds Expenditure – Invoice Line Fields Report

Other Analytics Enhancements

- The **Subscription from Date** column has been restored to all PO line dimensions. In addition, the Subscription End Date column was renamed **Subscription to Date**.
- The list of Analytics lending request statuses now matches the list of lending request statuses in the Alma UI.

Alma APIs

The following section describes the Alma API enhancements provided in the February 2015 release.

Alma RESTful APIs

- The following enhancements were made to the User RESTful APIs:
 - Support for multiple resource sharing libraries was added.
 - The ability to manage user roles was added.
 - A new field, `full_name`, was added to the Get User RESTful API. This field includes the user's first name, middle name, and last name.

For detailed information on the User APIs, see <https://developers.exlibrisgroup.com/alma/apis/users>.

- The system control number non-serial match method has been added to the Create Order API (**Administration > General Configuration > Configuration Menu > External Systems > Integration Profiles > Actions > Edit** (for profile of integration type **New Order API**) > **Actions** tab):

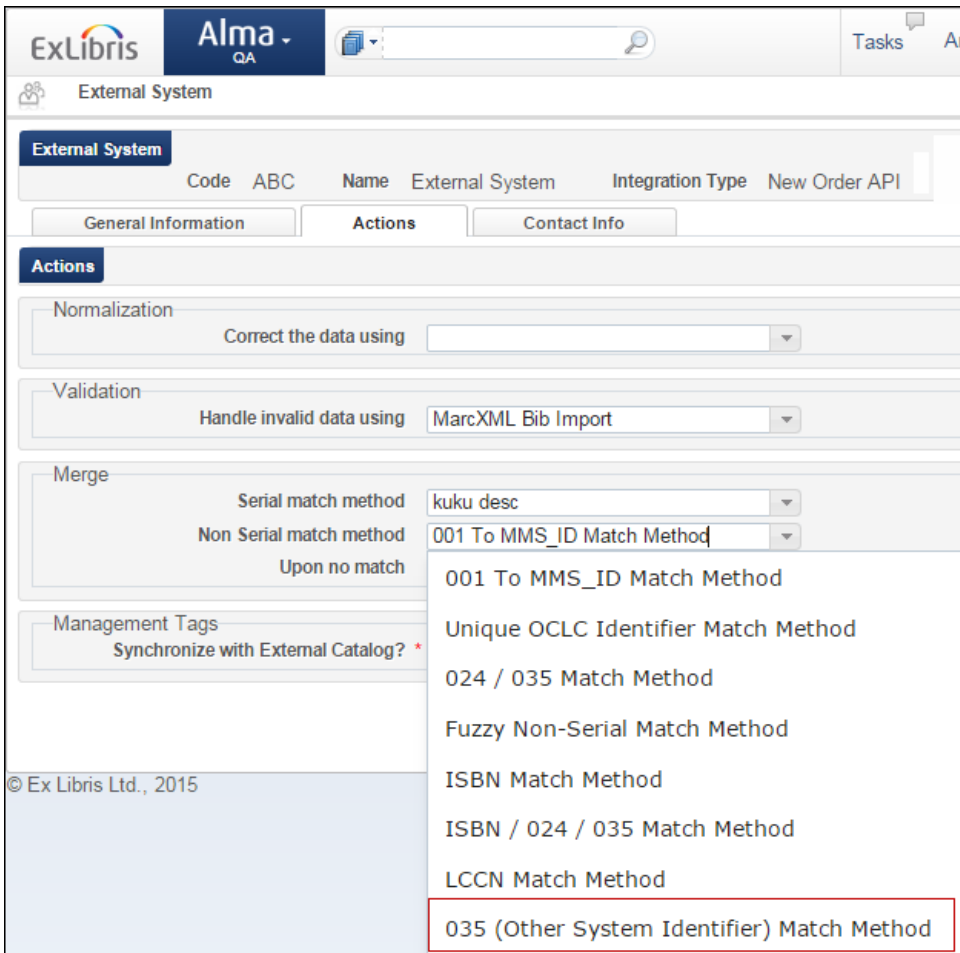


Figure 54 – Other System Identifier Non-Serial Match Method

For detailed information, see <https://developers.exlibrisgroup.com/alma/apis/acq>

Collaborative Networks and Multicampus Institutions

The following sections describe Alma enhancements provided for collaborative networks and multicampus institutions in the February 2015 release.

Merge Two Network Zone Bibliographic Records in the MD Editor

Description

With the February release, Alma provides the ability to merge two NZ bibliographic records (not linked to the CZ) in the MD Editor. This is especially helpful when catalogers identify duplicate bibliographic records in the catalog that they want to combine into one bibliographic record. The merge is handled by selecting one of the merge rules from a list of predefined merge routines. Merging two bibliographic records into one will also move the following entities to the merged record:

- PO line
- Electronic collections
- Electronic portfolios
- Physical items
- Digital representations
- Loans
- Requests
- Reading lists

Technical Instructions

The following role can merge bibliographic records:

- Cataloger Extended

To merge two bibliographic records using the MD Editor:

- 1 Using Repository Search, locate the two NZ bibliographic records that you want to merge. (Use the **Network** tab for your search.)
- 2 Edit both records so that they both display under the **Records** tab in the MD Editor.

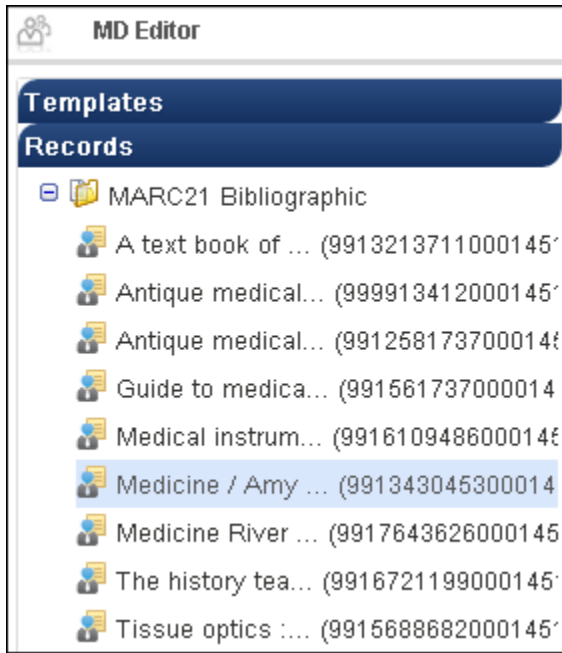


Figure 55 - Bibliographic Records under the Records Tab

- 3 From the list under the **Records** tab, click the preferred NZ bibliographic record first.
- 4 Click the **Split Editor** icon and click the non-preferred NZ bibliographic record so that it displays on the right (refer to the example below).

The records that you select to merge cannot include local member records. The records that you merge must be NZ bibliographic records.

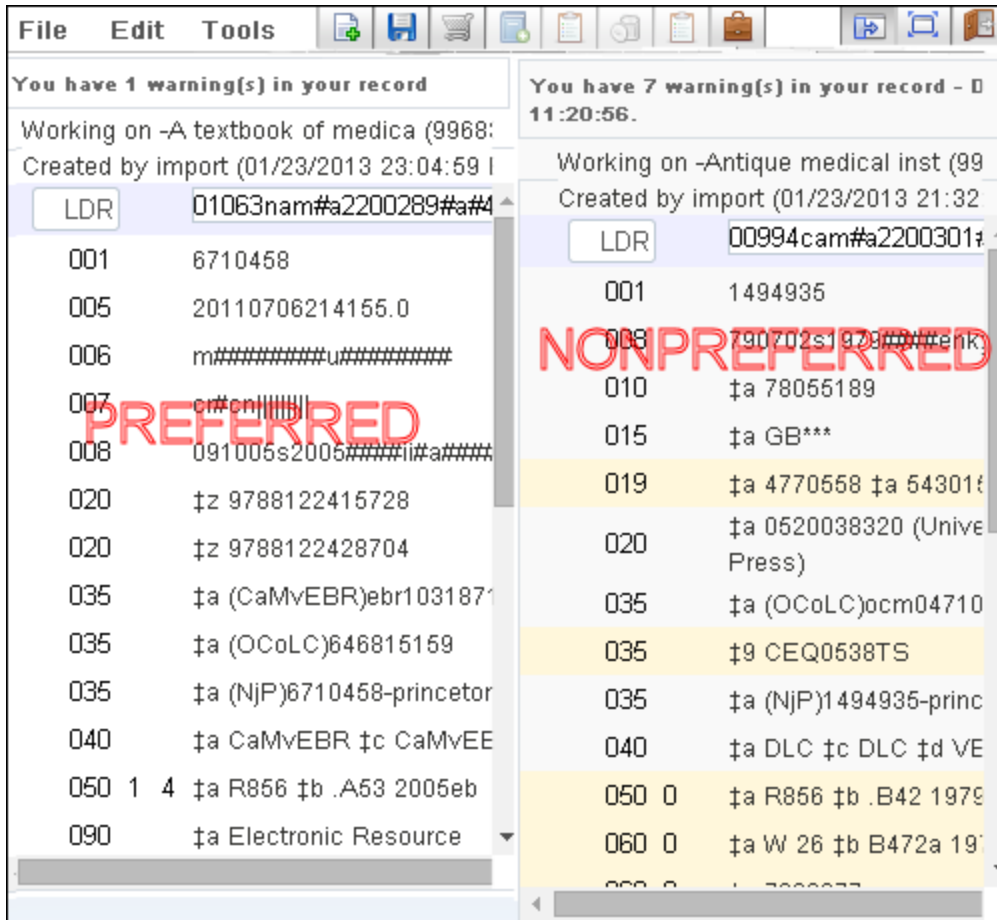


Figure 56 - Both Bibliographic Records Open (Preferred on the Left and Nonpreferred on the Right)

- To initiate the merge and combine inventory action, click **Merge Records & Combine Inventory** (Tools > MARC Bibliographic > Merge Records & Combine Inventory).

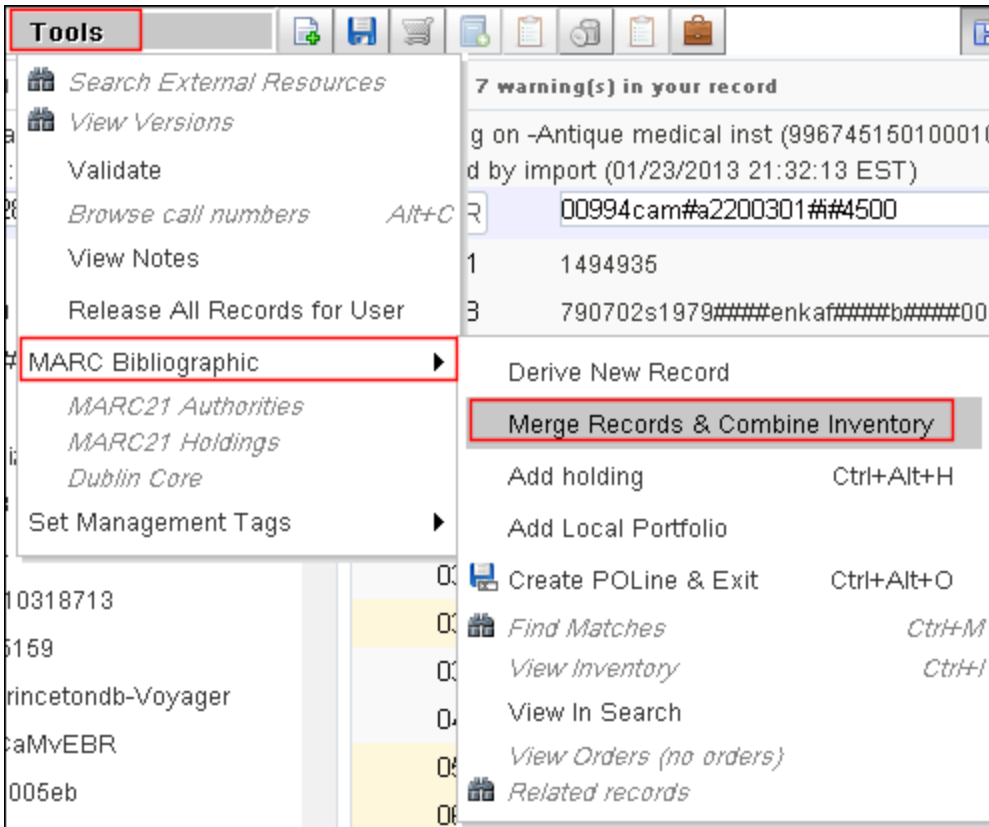


Figure 57 - Merge NZ Records and Combine Inventory

The Merge Records and Combine Inventory dialog box opens.

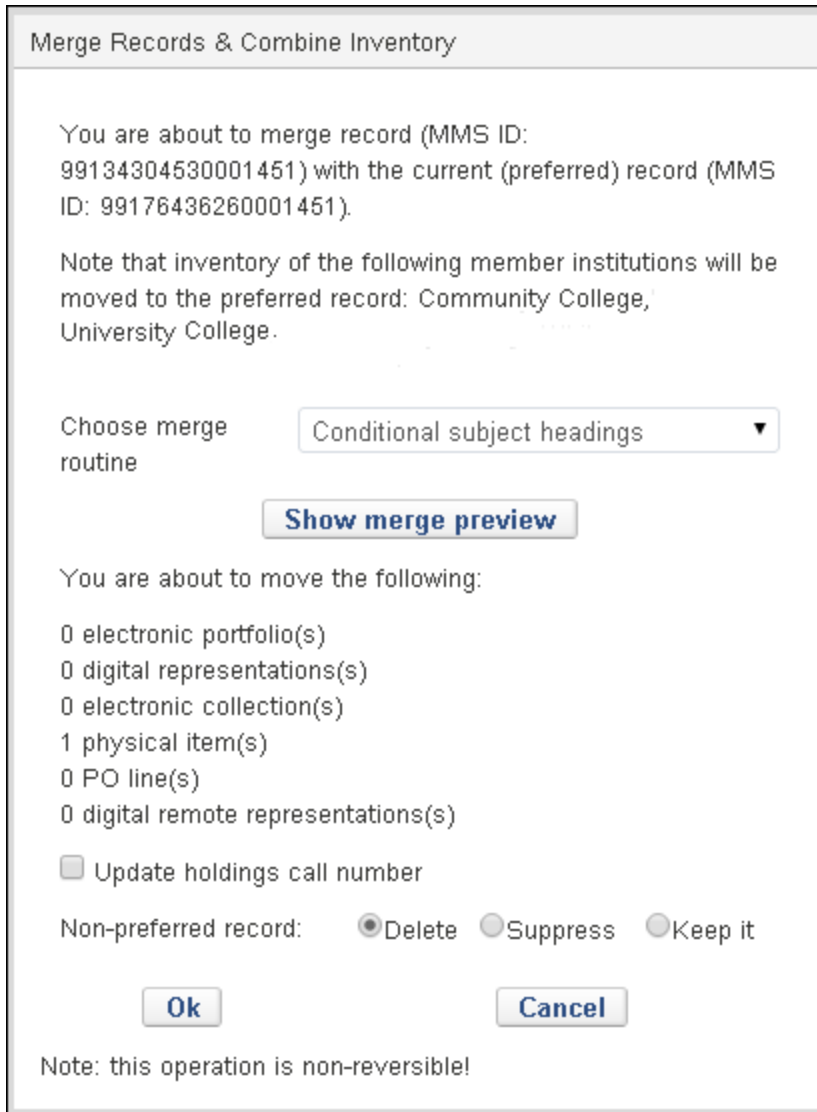


Figure 58 - Merge Records and Combine Inventory Dialog Box (NZ Environment)

- 6 Use the merge information/options provided.
 - a Review any messages displayed. In particular, be aware as indicated in the message that this operation is not reversible. In an NZ environment, a note is provided with a list of all the other member institutions that also have inventory for the non-preferred record, which will be moved to the preferred record.

Under **You are about to move the following:**, the system lists the changes that will occur after the merge. In addition, holdings requests, loans, and reading lists attached to the non-preferred record will be updated.

In the NZ environment, when you are logged in to the Network Zone system, the list under **You are about to move the following:** reflects the number of bibliographic record changes specific to the NZ inventory. When you are logged in to a member institution

system, the list under **You are about to move the following:** reflects the number of bibliographic record changes specific to the local, member institution's inventory.

- b Select a merge routine from the drop-down list. The merge routines that display in the list are pulled from the merge rules list under the **Rules** tab in the MD Editor.
- c To preview the merge results, click **Show merge preview**.

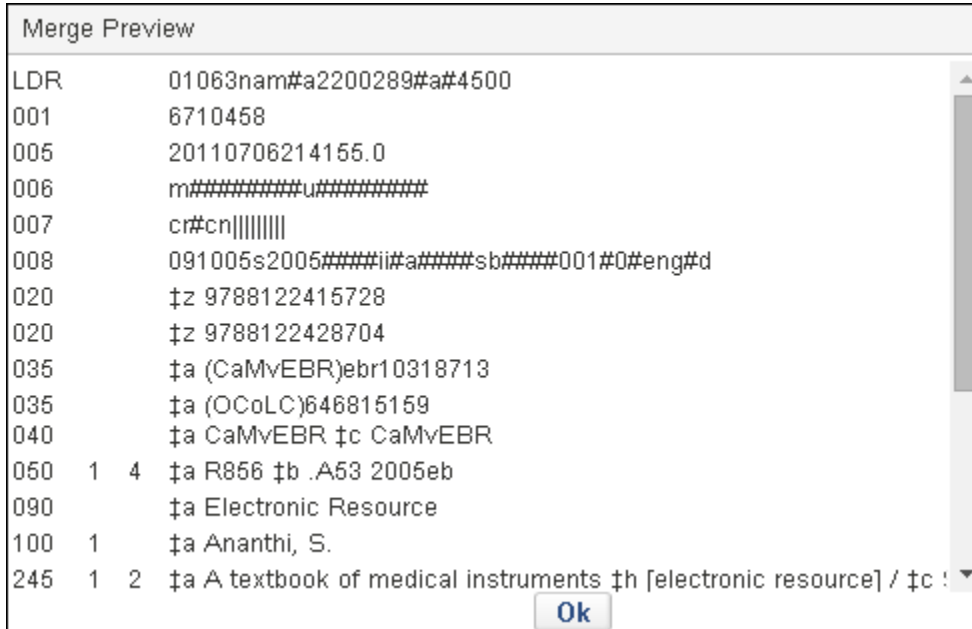


Figure 59 - Merge Preview

- d Click **OK** to close the **Merge Preview** view.
- e Optionally, select **Update holdings call number**. When you select this option, the system updates the call number information (using the bibliographic call number) for all the holdings associated with the preferred record. When you choose to have the call number information updated, this change is applied to the holdings associated with the preferred record after the bibliographic merge has been processed.
- f Select how you want to handle the non-preferred bibliographic record (after the merge) from the following options:
 - Delete
 - Suppress
 - Keep it

- g When you are ready to merge the two records, click **OK**.

If there is a constraint that prevents merging the two bibliographic records, such as if the preferred record is linked to the CZ or there is a fulfillment issue with the non-preferred record, the system will not merge the bibliographic records and provide warning messages.

In an NZ environment, for the current institution that is performing the merge operation, the changes to the preferred bibliographic record will be immediately available. For other member institutions that hold the preferred bibliographic record, there may be a slight delay (up to five minutes) while the system handles the processing changes in the background.

Update Network Zone Bibliographic Records as Part of the Shelf-Ready Workflow

Description

With the February release, it is now possible to update Network Zone bibliographic records as part of the shelf-ready workflow. This is accomplished with the new import profile parameter **Use Network Zone**.

With this parameter and the **By PO Line** match method selected, the system is now able to merge/overlay NZ bibliographic records, in addition to updating inventory, when the import job is run by a member institution. This is especially useful when the imported bibliographic record is a full bibliographic record that you want to automatically merge with or overlay on a brief bibliographic record in the NZ.

With the **Use Network Zone** parameter selected for import profiles that are updating inventory using the **By PO Line** match method, the system focuses only on NZ-linked bibliographic records and ignores/skips the local bibliographic records while continuing to use the local PO line data to identify matching records. The import job report provides a count for **Number of records skipped**. If this number is greater than zero, there are local records (records not linked to the NZ) that were not processed as part of the import job and will need to be handled separately.

Technical Instructions

The following role can create an import profile with the new **Use Network Zone** parameter:

- Catalog Administrator

To create an import profile with the Use Network Zone parameter:

- 1 Open the **Run Import** page (**Resource Management > Resource Configuration > Configuration Menu > Record Import section > Import Profiles**).
- 2 Click **Add New Profile**.
- 3 Select the **Update Inventory** profile type and click **Next**:

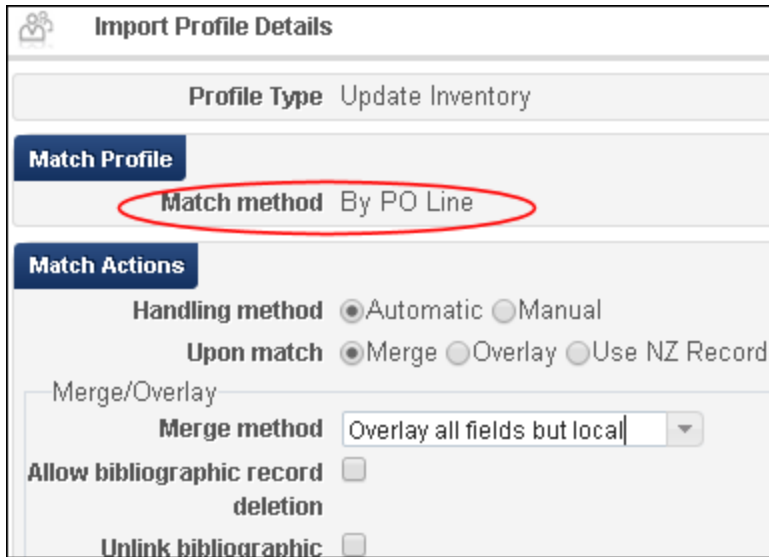
The **Import Profile Details** page opens with the new **Use Network Zone** parameter in the **Profile Details** section.

The screenshot shows the 'Import Profile Details' form. At the top, the 'Profile Type' is set to 'Update Inventory'. Below this, the 'Profile Details' section contains several fields: 'Use Network Zone' (checkbox, highlighted with a red box), 'Profile name *' (text input), 'Profile description' (text area), 'Originating system' (dropdown menu, 'WorldCat'), 'Import Protocol' (dropdown menu, 'Upload File/s'), 'Physical source format' (dropdown menu, 'XML'), 'Source format' (dropdown menu, 'MARC21 Bibliographic'), and 'Active' (dropdown menu, 'True').

Figure 60 - Use Network Zone Import Profile Parameter

- 4 Select the **Use Network Zone** parameter and complete the remainder of the **Profile Details** section as you normally would.
- 5 Click **Next** and complete the **Normalization** and **Validation Exception Profile** sections as you normally would.
- 6 Click **Next**.

The **Match Profile** section displays the **By PO Line** match method.



Import Profile Details

Profile Type Update Inventory

Match Profile

Match method By PO Line

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Use NZ Record

Merge/Overlay

Merge method Overlay all fields but local

Allow bibliographic record deletion

Unlink bibliographic

Figure 61 - By PO Line Match Method

7 Complete the remainder of the import profile as you normally would.

Network Zone: Inherited Policies and Terms of Use

Description

This feature enables policies and TOUs to be configured in the Network Zone, and to be distributed to the network's member institutions. When the scheduled **Distribute Network Fulfillment Changes to Members** job runs, changes made at the network level take effect on the distributed policies and TOUs in the member institutions.

Technical Instructions

To configure policies and TOUs in the Network Zone, you must have one of the following roles in the Network Zone institution:

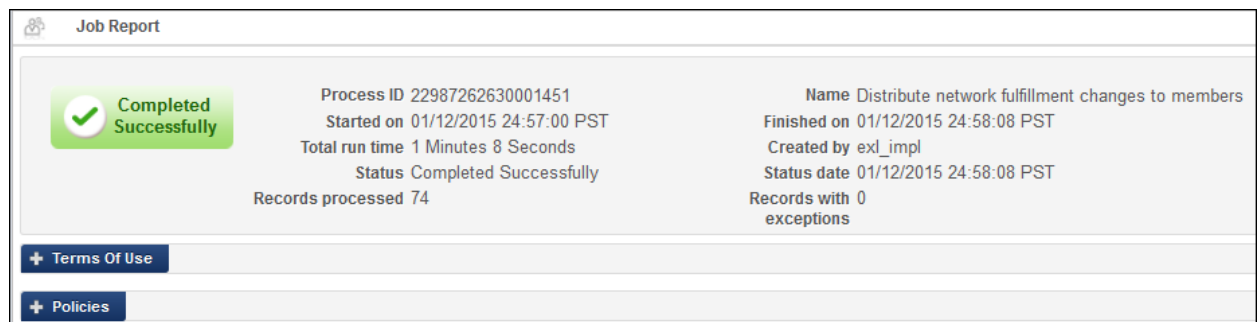
- General System Administrator
- Fulfillment Administrator

To monitor the **Distribute Network Fulfillment Changes to Members** job, you must have the following role in the Network Zone institution:

- General System Administrator

To configure a policy on the Network Zone level:

- 1 In the Network Zone institution, open the Policy Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Advanced Policy Configuration**) and click **Add Fulfillment Policy**. Follow the procedure for configuring a fulfillment policy, as described in the Fulfillment Configuration chapter of the *Alma Fulfillment Guide* or Alma online help.
- 2 On the Terms of Use Management page (**Fulfillment > Fulfillment Configuration > Configuration Menu > Physical Fulfillment > Terms of Use and Policies**), click **Add a Terms of Use** and create a TOU of the type **Loan**.
- 3 Assign the policy you created above to the newly created TOU.
- 4 On the Monitor Jobs page (**Administration > Manage Jobs > Monitor Jobs**), locate the **Distribute Network Fulfillment Changes to Members** job.
- 5 After the job runs, on the Monitor Jobs page **History** tab, select **Actions > View** for the completed job. The Job Report page opens.



The screenshot displays a 'Job Report' page for a completed job. On the left, there is a green checkmark icon and the text 'Completed Successfully'. The main content area is divided into two columns of job details. The left column includes: Process ID 22987262630001451, Started on 01/12/2015 24:57:00 PST, Total run time 1 Minutes 8 Seconds, Status Completed Successfully, and Records processed 74. The right column includes: Name Distribute network fulfillment changes to members, Finished on 01/12/2015 24:58:08 PST, Created by exl_impl, Status date 01/12/2015 24:58:08 PST, and Records with 0 exceptions. At the bottom of the report, there are two expandable sections: '+ Terms Of Use' and '+ Policies'.

Figure 62 – Job Report Page

6 Expand the **Terms of Use** and **Policies** sections to view the job's output.

Job Report [Back](#)

Completed Successfully

Process ID 22987262630001451
 Started on 01/12/2015 24:57:00 PST
 Total run time 1 Minutes 8 Seconds
 Status Completed Successfully
 Records processed 74

Name Distribute network fulfillment changes to members
 Finished on 01/12/2015 24:58:08 PST
 Created by ex_impl
 Status date 01/12/2015 24:58:08 PST
 Records with 0 exceptions

Terms Of Use [Tools](#)

	Institution Name	Records Succeeded	Records Failed		
1	01ALLIANCE_PU	Pacific University	1	0	Actions
2	01ALLIANCE_LINF	Linfield College	1	0	Actions
3	01ALLIANCE_WU	Willamette University	1	0	Actions
4	01ALLIANCE_WWU	Western Washington University	1	0	Actions
5	01ALLIANCE_UW	University of Washington	1	0	Actions
6	01ALLIANCE_MRY	Marylhurst University	1	0	Actions
7	01ALLIANCE_SOU	Southern Oregon University	1	0	Actions
8	01ALLIANCE_CC	Clark College	1	0	Actions
9	01ALLIANCE_UO	University of Oregon	1	0	Actions
10	01ALLIANCE_UID	University of Idaho	1	0	Actions
11	01ALLIANCE_WPC	Warner Pacific University	1	0	Actions
12	01ALLIANCE_LCC	Lewis & Clark College	1	0	Actions
13	01ALLIANCE_WOU	Western Oregon University	1	0	Actions
14	01ALLIANCE_PCC	Portland Community College	1	0	Actions
15	01ALLIANCE_UPUGS	University of Puget Sound	1	0	Actions
16	01ALLIANCE_UPORT	University of Portland	1	0	Actions
17	01ALLIANCE_OHSU	Oregon Health and Science University	1	0	Actions

Figure 63 – Job Report Page – Terms of Use Output

7 Select **Actions > View Succeeded Records** or **Actions > View Failed Records** to view the job's succeeded or failed records.

Job Report

Job Events

[Export To Excel](#)

[Created Terms of Use\(1\)](#)

[Updated Terms of Use\(0\)](#)

[Deleted Terms of Use\(0\)](#)

Figure 64 – Job Report Page – Succeeded Record

Succeeded records indicate that TOU/policies have been successfully distributed from the Network Zone to its member institutions.

In each of the member institutions, you can now see the policies and terms of use that have been defined in the above steps at the Network Zone. On the Policy Management page, the policy displays with a **Policy Owner** value of **Network**.

Policy Management						
You are configuring: Pacific University						Organization Unit List
Fulfillment Policies						
Policy Type		Due Date			Find :	in :
Add Fulfillment Policy						
1 - 16 of 16						
	Policy Type	Policy Name	Value	Unit Of Measurement	Is Default	Policy Owner
1	Due Date	No Loan	0	Days		Institution
2	Due Date	No Due Date - Non-circulatable	0	Week	✓	Generic
3	Due Date	Network test - naama due date 15 days	15	Days		Network
4	Due Date	End of Term	End of Spring Term 2015	-		Institution
5	Due Date	Due Date 1	1	Days		Network
6	Due Date	DD check	1	Hours		Institution
7	Due Date	7 day Loan	7	Days		Institution
8	Due Date	6 week Loan	6	Week		Institution
9	Due Date	6 day Loan	6	Days		Institution

Figure 65 – Policy Management Page — Network Policy

Note: If you select **Actions > Edit** for a network policy, the policy is saved as an institution policy (**Policy Owner = Institution**). If you then select **Actions > Delete** for an institution policy that belongs to a network, the policy is deleted from the institution but is saved as a network policy (**Policy Owner = Network**).

- When trying to delete a Network Zone policy that has been linked at a member institution to an institution level TOU, the policy does not delete. The Job Report page for failed records (**Actions > View Failed Records**) displays the link, **Could not delete. Terms of Use are connected to this policy**. You can click the link to view the policy. The policy is modified from being a network policy to being an institution policy.

Job Report	
Job Events	
Export To Excel	
Failed to create Policy(0)	
Failed to update Policy(0)	
Failed to delete Policy(0)	
Could not delete. Terms of Use are connected to this policy(1)	

Figure 66 – Job Report Page — Failed Record When Trying to Delete Policy Connected to TOU

Note: When creating a network policy with a fixed value type (**Value Type = Fixed**), a value (event) can be selected only if the member institutions are configured with an event of the same name.

Collaborative Networks – Central Management of User Accounts

Description

This feature enables a distributing a user from the Network Zone to all member institutions in the collaborative network. When doing so, the user becomes a registered user at all member institutions in the network. The user's account type remains the same after it is distributed (that is, external accounts remain external, and internal accounts remain internal).

When distributing a user to an NZ's member institutions, the new user inherits all roles from the user in the NZ, except for the following:

- Roles assigned to a specific library (such as Circulation Desk Operator)
- Roles assigned specific parameters on the User Roles Details page

Technical Instructions

The following roles in the network zone can distribute a user from the Network Zone to the member institutions:

- User Manager
- User Administrator

To distribute a user from the NZ to the member institutions:

- 1 On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select **Actions > Distribute** for a user. A confirmation dialog box appears.

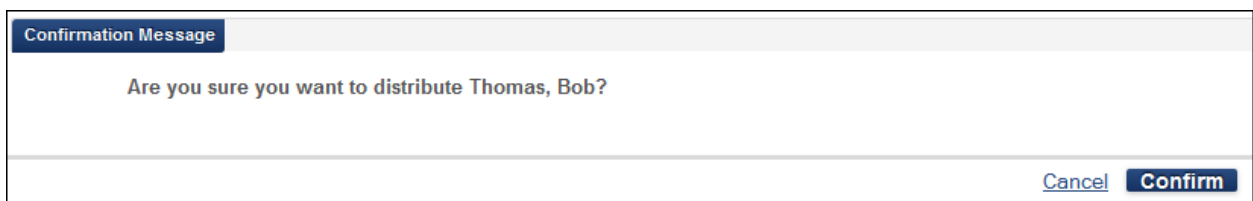


Figure 67 – Confirmation Message Dialog Box

- 2 Click **Confirm**. The Find and Manage Users page reappears.

To distribute a user from the NZ to the member institutions using the User Details form:

- 1 On the Find and Manage Users page (**Administration > User Management > Find and Manage Users**), select **Actions > Edit** for a user. The User Details page opens.

The screenshot shows the 'User Details' form for a user named Bob Thomas. The form is divided into several sections: 'User Information', 'User Management Information', and 'User Administration Information'. The 'User Information' section contains fields for First name (Bob), Last name (Thomas), Primary identifier (bob.thomas), Job category, Gender, Campus, Preferred language (English), Status date (09/10/2014), Expiration date, Resource sharing library, Middle name, Job description, User group (Staff), Website URL, Status (Active), Birth date, and Purge date. The 'User Management Information' section shows the Type as 'Internal - Refers to a user type whereby the user information is managed wholly within Alma'. The 'User Administration Information' section shows the user was created by Cornish, AI (09/10/2014) and updated by alma, alma (12/12/2014). The 'Save and Distribute' button is highlighted in red in the top right corner.



Figure 68 – User Details Page – Save and Distribute Button

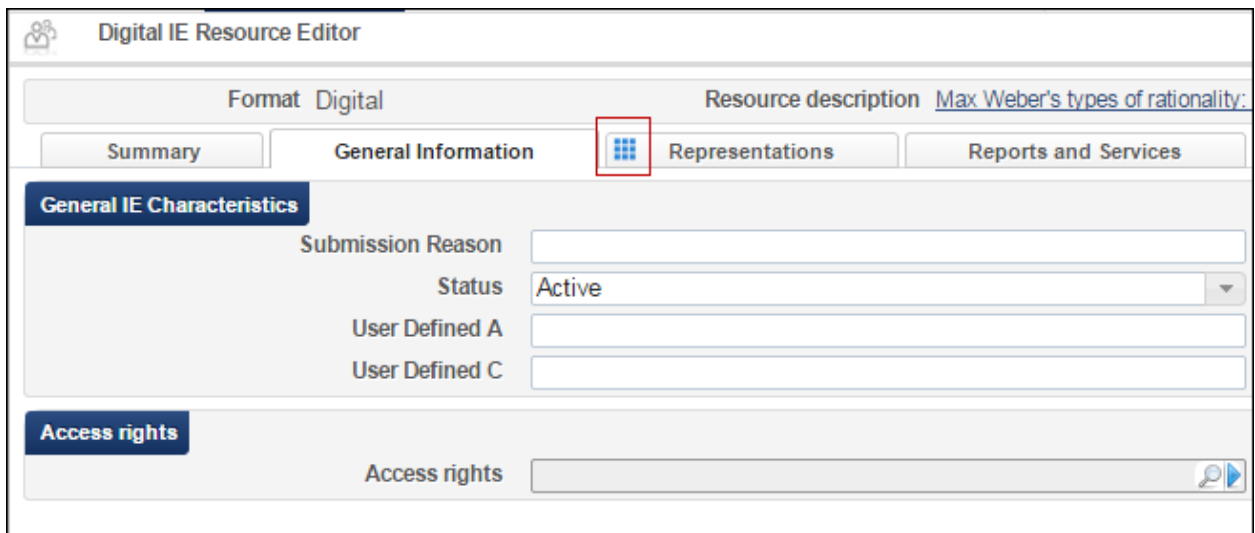
- 2 Click the **Save and Distribute** button, and click **Confirm** in the resulting confirmation message dialog box. The user is distributed to the NZ's member institutions.

Alma Interface Updates

The following section describes Alma interface update enhancements provided in the February 2015 release.


Has Content Icon Added

Icons have been added to the **Representations** tab of the Digital IE Resource Editor (**Digital Title > Edit**) and the **Survey Form, Participants, Analysis, and Alerts** tabs of the Trial Details page (**Acquisitions > Purchase Order Lines > Manage Trials**). A blue icon  indicates that the tab has content and a gray icon  indicates that the tab does not have content:







The screenshot displays the 'Digital IE Resource Editor' interface. At the top, there is a header with a user icon and the text 'Digital IE Resource Editor'. Below this is a navigation bar with tabs: 'Summary', 'General Information', 'Representations', and 'Reports and Services'. The 'Representations' tab is selected and highlighted with a blue border, and a blue grid icon is visible on its left side. The main content area is divided into two sections: 'General IE Characteristics' and 'Access rights'. The 'General IE Characteristics' section includes fields for 'Submission Reason', 'Status' (set to 'Active'), 'User Defined A', and 'User Defined C'. The 'Access rights' section includes an 'Access rights' field with a search icon on the right.






Figure 69 – Has Content Icon – Digital IE Editor

 **Trial Details**

Name Country profile. Bolivia / EIU, the Economist Intelligence Unit
Description Country profile. Bolivia / EIU, the Economist Intelligence Unit
Status Draft

Summary  **Survey Form**  **Participants**  **Analysis**  **Alerts**

Details

Name *
Start Date *  
Notification Period
Contact   

Analysis and Result



Result 
Result Reason 

Figure 70 – Has Content Icon – Trial Details

Known Issues

- When importing an EOD file using the New Order profile, if the location of the item does not have a call number type, the call number type of the institution should be used as the alternative call number type. Currently, however, no alternative call number is used.
- Although the borrower side renewal of loaned items that have been received through a resource sharing request is controlled by the partner's workflow profile, changing the due date using the various Change Due Date options is possible even if the workflow profile does not allow this option.
- Currently, Legal Deposit claim notifications are sent for one-time-order items only. Claim notifications for continuous-order items will be available in a future Alma release.
- Related to merging bibliographic records in the MD Editor, if there are no requests, the Merge Records and Combine Inventory pop-up window does not display a count of 0 (zero) requests. The count displays for requests only when it is greater than 0 (zero). The count should also display 0 (zero) requests when they occur.
- The **Locate By** attributes of a Locate profile cannot be distributed from the Network Zone to member institutions.

Fixed Issues

The following previously known issue has been fixed:

- Available For groups defined for electronic collections and services are both displayed sporadically in an electronic collection search, although only service-level Available For groups should be displayed.